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Two-party political system strengthened by Florida's growth

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The influence enjoyed by the Democratic Party in Florida's 135 years of statehood is almost legendary. In that time Floridians have elected only four Republican governors, Claude Kirk (1976) being the first since 1874. Historically, representatives in the state legislature have been overwhelmingly Democratic and before 1965 no less than 80 percent of Florida's registered voters were Democrats.

With Florida's rapid population growth in the past three decades, however, the state's political balance has begun to change. Republicans now account for 27.9 percent of all registered voters, down slightly from their highest point (28.0 percent) in the years prior to Watergate. Figures 1 and 2 illustrate the recent gains made by the Republican Party both in the percentage of voters and in the willingness of Floridians to vote for a Republican gubernatorial candidate.

Democratic tradition

Much of the traditional success of the Democratic Party can be attributed to the solid foundation laid in Florida's early years when the population was centralized in the triangle enclosed by Tallahassee, Jacksonville and Orlando. This concentration of population, combined with the belief that a united Democratic Party was the best way to maintain the integrity of the South, proved to be practically unbeatable for over a century. Only in the elections of 1868 and 1873 did the Republican Party ever seriously challenge the Democrats' control of state government, and that challenge was short-lived.

It was not until the population growth of the 1960s and early 1970s that Republicanism strengthened again. As Florida grew, the Republican Party grew, making its largest gains in the south and southwest. The increase in GOP membership during this period came not so much from old-line Democrats switching over but from the influx of northern Republicans.

Geographic party lines

In many of the southern counties, persons 65 years of age and older made up a significant proportion of the population increase. The west coast, from Pinellas to Collier County, now has the greatest concentration of Republicans as well as the highest percentage of retirement-aged citizens in the state (see Figure 3 and Table 1). In the two Republican-controlled counties (Manatee and Lee) 40 and 29 percent, respectively, of the voting-age population is 65 or older.

Voting participation by older people also adds to the strength of the Republican Party. According to the U.S. Department of Commerce in the publication *Population Characteristics; Voting and Registration,* persons 65 and older consistently have a higher percentage of registered voters and a higher turnout in national elections than younger groups.

Just as the GOP is most heavily supported on the west coast and in south

(continued on p. 4)

Figure 1.—Registered Republicans in Florida, 1962-1978

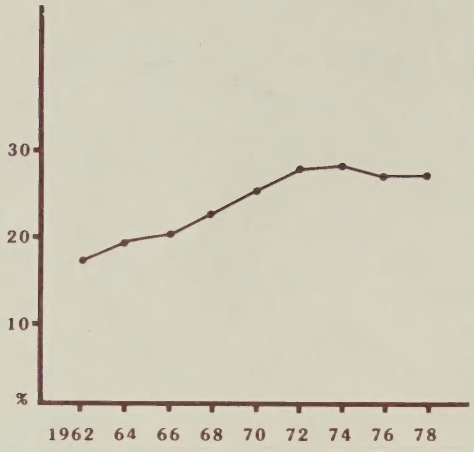

Figure 2.—Postwar Republican gubernational vote in Florida, 1948-1978

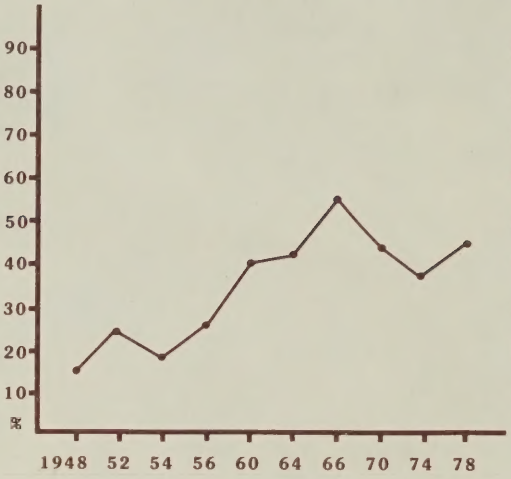

Figure 3.—Postwar Republican presidential vote in Florida and the nation, 1948-1976

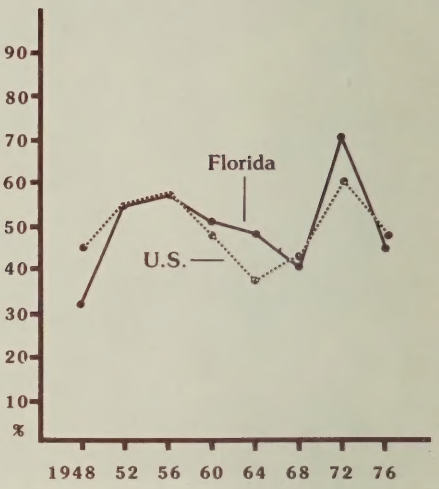

Figure 4.—Percentage of registered Democrats by county in Florida with percentage of voting-age population 65 and older in selected southern counties, 1978

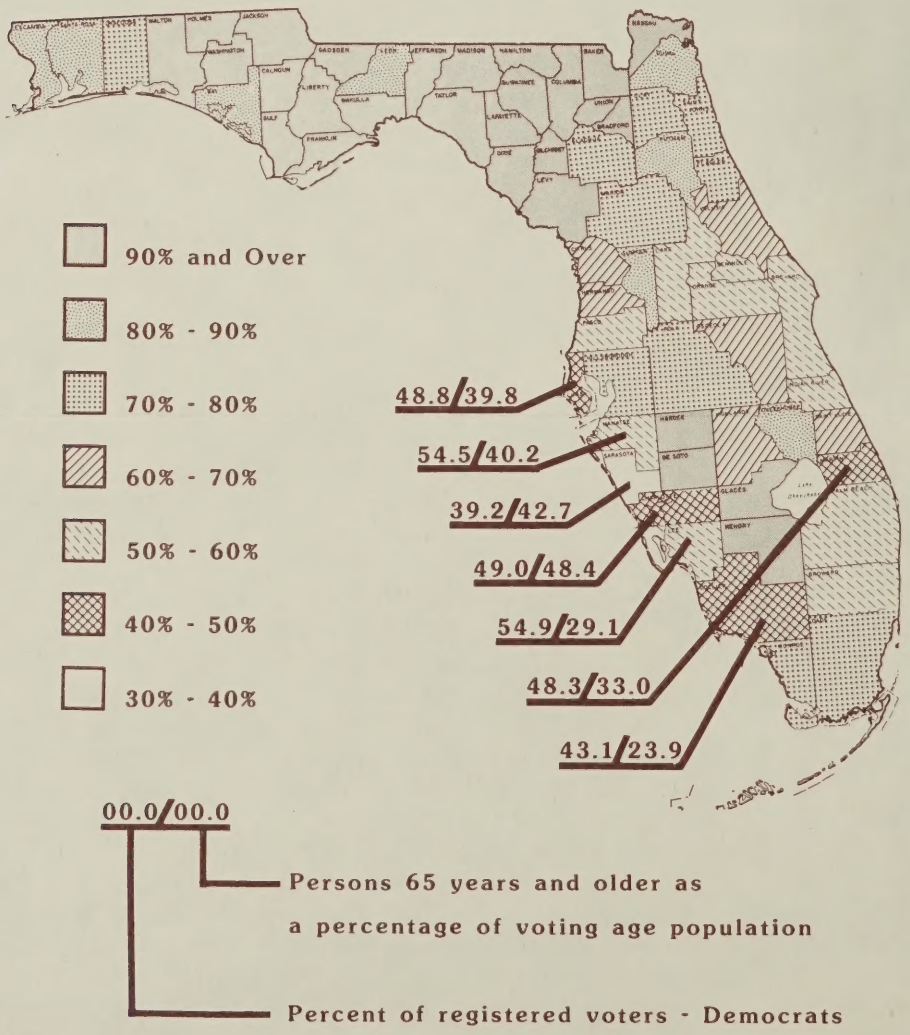

Table 1.—Voting-age populations and voter registration in Florida, 1978; vote tabulations, 1976 and 1978

	Estimates of persons 18 years of age and older July 1, 1978	Persons 65 years and older as a percentage of the voting-age population	Registered voters, November 7, 1978				Tabulation of 1978 vote		Tabulation of 1976 vote	
					Percentage of total					
			Total	Black	Democrat	Republican	Percentage Democrat	Percentage Republican	Percentage Democrat	Percentage Republican
Florida	6,620,314	23.7	4,217,187	417,827	66.7	27.9	55.6	44.4	51.9	46.6
Alachua	98,266	9.5	56,091	7,441	78.1	15.8	66.2	33.8	62.6	34.9
Baker	8,543	15.1	6,488	828	98.6	1.0	63.3	36.7	71.2	25.2
Bay	66,634	13.9	37,935	3,535	83.7	12.8	52.9	47.1	50.4	48.2
Bradford	12,235	14.4	7,178	1,158	92.9	5.5	63.6	36.4	68.9	29.9
Brevard	195,307	12.9	125,638	5,988	58.3	35.2	51.8	48.2	50.3	48.1
Broward	708,995	27.6	461,441	24,986	59.7	33.5	63.6	36.3	51.6	47.1
Calhoun	6,078	20.7	4,959	531	98.0	1.6	72.8	27.2	67.4	31.3
Charlotte	42,655	48.4	32,917	454	49.0	45.5	42.7	57.3	44.1	54.4
Citrus	31,937	39.6	24,170	714	68.2	26.8	41.9	58.1	53.3	45.0
Clay	34,422	12.9	24,057	1,185	72.7	23.0	44.1	55.9	49.0	49.4
Collier	54,760	23.9	32,989	796	43.1	50.2	39.2	60.8	37.0	61.8
Columbia	20,065	14.6	14,645	2,539	93.6	5.7	50.4	49.6	62.1	36.7
Dade	1,118,593	20.8	685,467	104,095	73.9	19.2	70.1	29.8	58.1	40.5
De Soto	13,143	21.4	6,629	865	91.9	7.5	53.8	46.2	56.3	41.5
Dixie	5,108	16.3	4,653	471	99.3	0.6	72.1	27.8	78.8	20.3
Duval	403,093	12.9	234,248	54,500	82.0	14.7	52.5	47.5	58.0	41.1
Escambia	157,459	11.8	97,764	15,505	83.4	13.5	51.0	48.9	47.4	51.4
Flagler	6,115	28.2	5,518	438	73.5	21.2	60.2	39.8	61.8	37.4
Franklin	5,943	24.5	5,160	725	96.3	3.1	65.8	34.2	62.5	35.5
Gadsden	24,092	22.0	14,627	6,949	96.2	3.1	71.8	28.2	65.2	33.9
Gilchrist	4,244	20.1	3,287	109	98.9	0.9	68.7	31.3	76.8	22.4
Glades	3,782	17.9	3,244	435	95.4	3.5	72.6	27.4	66.7	31.8
Gulf	7,488	16.2	6,471	1,174	97.4	2.1	64.5	35.5	61.7	37.0
Hamilton	5,631	20.6	4,584	1,432	99.5	0.1	61.5	38.5	69.6	26.9
Hardee	11,129	17.6	7,578	636	91.7	6.4	56.1	43.9	52.3	42.9
Hendry	10,762	13.1	5,905	728	90.2	7.4	58.4	41.6	54.9	43.3
Hernando	26,885	33.1	21,384	1,136	68.7	27.3	47.5	52.5	56.2	42.2
Highlands	34,290	33.1	20,664	1,528	69.0	27.5	44.3	55.7	45.9	52.9
Hillsborough	434,437	16.2	232,241	23,067	76.6	18.8	55.6	44.4	54.0	44.8
Holmes	10,272	23.6	7,602	164	98.4	1.3	75.9	24.1	62.9	35.7
Indian River	38,316	27.9	24,873	1,831	54.4	39.8	44.6	55.4	45.6	52.6
Jackson	26,621	18.8	16,892	3,563	95.8	3.7	83.4	16.6	60.8	37.9
Jefferson	6,366	21.5	4,865	1,749	96.2	2.9	64.8	35.1	61.6	36.3
Lafayette	3,159	24.2	2,621	148	98.0	1.4	67.9	32.1	67.6	31.4
Lake	72,423	36.3	46,075	3,810	57.5	38.7	41.6	58.4	41.3	57.4
Lee	141,703	29.1	98,305	4,436	54.9	40.6	44.6	55.4	43.8	54.5
Leon	93,914	8.8	69,077	12,731	81.7	13.9	64.1	35.9	53.8	44.4
Levy	11,370	21.6	8,563	921	92.1	7.2	60.3	39.7	65.3	31.9
Liberty	2,959	18.1	2,957	282	99.0	0.7	68.3	31.7	64.0	34.9
Madison	9,656	21.5	6,885	2,247	97.1	2.6	65.9	34.1	63.8	34.9
Manatee	107,187	40.2	74,650	3,868	54.5	40.8	43.5	56.5	44.8	53.9
Marion	72,293	22.3	45,767	6,277	76.0	20.9	49.8	50.2	50.4	48.0
Martin	41,396	33.0	31,188	1,463	48.3	46.1	47.2	52.8	42.3	56.3
Monroe	40,940	17.3	31,888	1,696	78.5	14.9	55.9	44.1	56.1	41.7
Nassau	19,325	12.3	12,201	1,807	93.2	5.6	53.6	46.4	64.5	34.3
Okaloosa	74,044	6.5	45,529	1,609	77.8	20.0	49.6	50.4	42.7	55.9
Okeechobee	11,811	15.6	6,601	519	87.9	10.2	68.6	31.4	66.0	33.1
Orange	302,035	15.0	170,707	18,501	59.9	34.0	53.8	46.2	44.8	54.0
Osceola	27,392	29.7	20,123	814	61.6	34.3	50.5	49.5	48.6	49.8
Palm Beach	403,882	27.4	264,395	21,238	56.4	36.4	58.2	41.8	48.7	49.5
Pasco	119,962	40.9	96,073	1,017	57.4	36.5	45.2	54.8	53.7	45.1
Pinellas	568,164	39.8	401,323	18,895	48.8	44.8	43.7	56.3	48.0	50.8
Polk	200,358	21.6	117,176	11,026	76.2	22.0	46.3	53.7	51.0	47.7
Putnam	30,822	21.3	20,309	2,572	84.5	12.8	60.0	40.0	64.8	34.0
St. Johns	31,937	23.1	19,391	2,283	79.0	18.1	44.6	55.4	51.6	46.3
St. Lucie	55,243	26.4	33,800	4,851	63.4	31.6	51.7	48.3	51.2	47.5
Santa Rosa	35,908	10.3	25,398	952	85.0	12.0	52.2	47.8	46.1	52.4
Sarasota	151,587	42.7	103,976	2,456	39.2	55.0	42.1	57.9	36.8	61.8
Seminole	100,961	14.6	54,471	4,516	56.6	36.2	50.7	49.3	41.9	56.9
Sumter	15,345	22.2	10,598	1,639	88.0	9.9	57.0	43.0	66.6	31.2
Suwannee	14,358	22.8	10,531	1,433	94.0	5.3	50.4	49.6	63.7	32.5
Taylor	10,272	18.4	7,181	962	95.0	4.2	62.6	37.4	62.3	36.7
Union	8,314	9.1	3,144	437	98.8	1.0	70.2	29.8	72.5	26.7
Volusia	176,690	31.5	108,241	8,422	64.1	30.1	56.4	43.6	55.7	42.5
Wakulla	6,107	15.7	5,839	828	95.0	4.0	58.9	41.1	57.8	38.8
Walton	14,124	24.1	11,538	895	93.9	5.1	67.8	32.8	62.8	35.4
Washington	11,007	25.0	8,496	1,021	95.0	4.2	73.8	26.2	59.5	38.6

Sources: University of Florida, Bureau of Economic and Business Research, Florida Statistical Abstract, 1979; State of Florida, Department of State, Division of Elections, Tabulation of Official Votes: Florida General Election, November 7, 1978, and Florida General Election, November 2, 1976. Computations by the author.

(continued from p. 1)

Florida, the Democrats' support is located primarily in the northern and central areas of the state—areas traditionally Democratic and areas least affected by immigration. Although the state as a whole has begun to show signs of accepting a two-party system, the parties remain geographically split between the Democratic north and the more Republican south.

Party spokesmen

The executive director of the state Republican Party, Don Weidner, concedes that his party is in a minority position in much of the state, but sees the future as a period of growth. "The trend is toward Republicanism," he says. "We are strong in most of the southern counties and getting stronger in many of the traditionally Democratic northern counties."

According to Weidner, growth in the party will depend on the ability of Republicans to offer strong alternative candidates in areas where 80 to 99 percent of the voters are registered Democrats. Weidner cites the former two-term Republican member of the state Public Service Commission, Paula Hawkins, as an example of the viability of the GOP in statewide elections. "Paula Hawkins is just one example of the type of leadership you can expect from the Republican Party in the future," says Weidner.

The state Democratic Party executive director, Biff Crane, sees the growth in the Republican Party as "centralized, especially in the planned communities along the west coast. But," he adds, "they are not raising Republicans in the state," and suggests that very few Democrats are switching to the Republican Party. "Their growth in the past has come from Republican retirees moving into the state," a source Crane feels will be less significant in the future.

Presidential surprise

The predominance of one-party politics on the state and local levels over the years would seem to indicate strong Democratic support in presidential elections, but the vote has not been nearly so one-sided. Figure 3 shows Florida's comparability with the national average, and suggests that party affiliation plays a lesser role in a presidential election than in state and local elections. Both Weidner and Crane agree on this point but for slightly different reasons.

Weidner believes the strong Republican showing in national elections is because, "Floridians are basically Republicans." The exposure of the presidential election highlights the difference between the two parties, and, he says, "The vote indicates that the Republican Party best serves their interests."

Democratic Executive Director Crane sees the national vote as a slight split in the party. "The areas where we have the largest numbers of Democrats consistently support the party, but some of the members in the rural areas are being wooed by the conservatism of the Republican presidential candidates."

Both executive directors predict a strengthing of their parties in the future. For the Republican Party, Weidner looks not only to the continued increase in Florida's population as a source of strength but also to the increased efforts to offer alternative candidates in areas of traditional Democratic control.

The Democratic Party is expected to grow as Florida's population increases too. According to Crane, "Almost as many northern Democrats are moving into the state as northern Republicans." Crane also sees a majority of the first-time voters registering as Democrats.

Although neither director expects a sweeping change in voter preference, Crane said, "With the election of Claude Kirk, Florida lost its status as a one-party state."

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Readers should note that the data used in this article are cumulative, to 1978. More current information will be available after the primary elections in March, September, and October of this year. County data should be available from voter registration offices. Statewide data can be obtained from the Division of Elections in Tallahassee.

Much of the information for this article was obtained from the *Florida Statistical Abstract, 1979,* available from the University Presses of Florida, 15 N.W. 15th Street, Gainesville, Florida 32603.

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The role of the dealer/processor in consumer waste recycling

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The waste and scrap dealer/processor systems currently established and operating in Florida appear to have a significant potential in helping recycle wastes from consumer sources. This conclusion results from analysis of data collected by the author in a major study of the recycling industry in Florida.

The primary problem associated with the recycling of consumer waste is collecting it. Prevalent marketing practice is to distribute products on a widespread basis. As a result, consumption wastes appear in small quantities and in literally millions of locations—primarily the households of America.

In those cases where there is an unusual economic incentive, manufacturer-controlled recycling centers have evolved to cope with the accumulation problem. An example is the Reynolds' recycling program in Florida which collected and processed almost 12,000 tons of aluminum beverage containers in the state in 1976. However, this is an unusual case. Aluminum has a very high recycle potential and the present rate paid to consumer collectors is 20.0 cents per pound. In contrast, container glass is occasionally purchased by container manufacturers for 1.5 to 2.0 cents per pound, an amount approximately equal to the cost of the raw materials. Due to the economics of the situation, manufacturers have little real interest in the concept since virgin sources are just as inexpensive and quality control is much easier to maintain.

Further, it is unlikely that established dealer/processors would have an interest in attempting programs similar to the Reynolds operation since the methods used are totally foreign to the majority of dealer/processor operations. For example, part of the Reynolds success factor is a mobile collection system used to cover large geographic regions on a scheduled basis. A local dealer/processor could not afford to set up such a system nor is his base of operations broad enough to cover a widespread market area. He is keyed to the immediate locality and to the large-volume industrial accounts in that locality.

However, the vast majority of consumer waste problems are embodied in the trash and garbage collected from households by municipalities as part of the basic public service package. An alternative to traditional "burn and bury" landfill disposal is for municipalities to develop and operate municipal resource recovery systems. As explained in an article by the author in *The Journal of Business Research*, Vol. 1, No. 6, "A resource recovery center is usually a public facility that accepts consumer solid waste as is for further processing. Processing consists of mechanical separation of desired secondary materials (materials recovery stage) in conjunction with a shredding stage that prepares the remaining elements of solid waste for possible use as a fuel in an energy-producing system (energy recovery stage) of one type or another. Thus, this type of system is capable of extracting generic categories of secondary materials such as glass, aluminum, and ferrous metals. The decision as to which components to extract is based on such factors as rate of occurrence in the solid waste stream, marketability of the secondary material, and the ability of the municipality to fund the facilities necessary to carry out the recovery operations. The revenues received from recovery operations are used to offset the total costs of operating municipal solid waste systems."

With the concept of municipal resource recovery systems in mind, the

real potential of the dealer/processor to assist in solving the consumer waste problem becomes evident. These organizations can serve as the vital processing and marketing specialists in distribution systems that link municipal resource recovery centers with markets.

Several factors encourage such a marriage between inevitable public involvement in recycling and private business. First, dealer/processors are already operating in the right channel systems. They are already geographically sited and have the market knowledge and expertise to move the product, a specialty hardly to be expected of a municipal government which is dabbling in recycling.

Secondly, dealer/processors have the equipment necessary to carry out the processing necessary to meet the stringent specifications required by end-users. In this regard, the idea that a municipal government should build its own sophisticated processing facility violates several basic principals, including the notion that government should not intrude in the domain of private business. There are also significant economic arguments in this regard. As noted by the National Center for Resource Recovery in a bulletin issued in the fall of 1975, "Maximization of revenues means recovery followed by upgrading (processing) or conversion to a higher gross value product. There seems little sense in adding processing steps to the recovery plant if these can be or are being done by a scrap processor or other existing industry. Generally, there is a greater amount of material processed at these facilities (existing industry) which leads to more economical use of capital equipment."

Finally, the role of the dealer/processor as a marketing specialist cannot be fully understood unless the qualitative factor of "good trade relations" is understood in the context of the selling function. Dealer/processors have developed the personal expertise and relationships with buyers necessary to insure repeat sales over the long run. Underlying these relationships are qualitative factors which reflect the overall integrity and reputation of the dealer/processor. A dealer's reputation for fast service, maintenance of product quality, on-time delivery, and ability to assemble large orders through performance of the brokerage function are basic means of achieving product differentiation in a homogeneous physical product market.

Table 1.—Number of dealer-processors handling specific scrap/waste materials by regional planning area

Types of waste/scrap materials handled	Regional planning district*											Total handling category in Florida
	1	2	3	4	5	6	7	8	9	10	11	
Ferrous	5	3	2	6	2	11	4	16	3	5	16	73
Nonferrous--general	4	3	2	6	2	15	4	21	6	8	33	104
(aluminum containers)	(3)	(1)	(2)	(2)	(2)	(12)	(2)	(17)	(3)	(4)	(9)	(57)
Glass	-	-	-	-	-	1	-	-	1	-	-	2
Rubber	1	-	-	1	-	-	-	1	-	-	-	3
Paper:												
News	1	1	-	3	-	6	-	4	2	1	8	26
Corrugated	1	1	-	3	-	6	-	4	1	1	8	25
Mixed	1	1	-	2	-	3	-	3	1	1	8	20
Higher grades	1	1	-	3	-	4	-	5	2	1	8	25
Total dealer/processors in regional planning district	6	4	2	9	2	20	4	27	6	10	40	130

*Florida Regional Planning Districts represent major concentrations of population and industry. Each county is included in one planning area.
Note: Columns do not total due to multiple answers.

These qualitative factors become even more important when one considers the extremely small number of potential buyers in the market (mills, foundries, etc.), each of which becomes extremely important, along with the instability that has traditionally plagued recycled-materials markets. Under these conditions, buyers and sellers attempt to establish long-term relationships in an attempt to insure continuity of operations. Thus, it is not unusual to find a dealer/processor supplying one of his prime customers at $10 below market simply because that customer continued to buy from that particular dealer during hard times. And, in times of short supply, buyers rely on previously established relationships to insure continued supply at the buyer's plant. It is difficult, at best, to see how municipal governments can step into such a situation and develop the expertise to compete with the ingenuity and flexibility of private enterprise.

In Florida, the author's research identified 130 dealer/processor organizations in the course of a major study of the recycling industry in the state completed in December, 1977. Telephone, mail, and personal interviews, with a variety of formats, were used to gain insight into the character and operations of dealer/processor organizations and to assess their potential to play a role in future recycling activities which involve consumer-generated sources of waste materials.

In order to identify and locate dealer/processor organizations, available directories, government, and trade sources were consulted. To qualify as a dealer/processor, an organization had to engage in processing activities involving generic materials. While this distinction may seem trivial, the intent was deliberate in order to exclude several known types of organizations such as hauling and collection specialists, exclusive brokerage specialists and auto parts salvage companies which generate the majority of their revenues not from the sale of *generic* materials but from the sale of used components.

The dealer/processor organization—a profile

A dealer/processor is a specialized marketing institution which combines the functional activities of manufacturing and marketing into a single overall operation. The manufacturing aspect of the business is usually labeled the "processing function," which essentially involves separating the mass of mingled scrap materials into homogeneous components. This usually necessitates the use of heavy equipment processing systems, which makes these manufacturing establishments for all practical intents and purposes, even though governments have traditionally

classified waste and scrap dealer/processors as part of the wholesale trade.

There are three basic channel types associated with the recovery and recycling of generic materials. Type 1 channels (direct from source to industrial user) typically occur when scrap sources produce large quantities of high- (or standard-) quality product that does not need extensive processing. However, if either the quantity or quality of wastes represents a serious problem, direct channels are an unlikely alternative.

Type II channels (direct from source to dealer/processor to industrial user) occur when the accumulation problem is significant and/or extensive processing is a necessity. These conditions are probably relevant to the majority of "purchased scrap" transactions and account for the presence and importance of the 130 Florida dealer/processor organizations identified.

Type III channels (direct from source to manufacturer-controlled recycling centers) reflect the special conditions which surround the use of certain secondary raw materials. This case occurs when an industrial user decides that his internal needs are so great that he should extend his operation to include the actual collection and processing of specific secondary raw materials used directly in his manufacturing operation.

Distribution in Florida

The 130 Florida dealer/processor organizations located during the study are shown in Table 1, which indicates the number of locations accepting general categories of scrap/waste materials in each of the state's regional planning areas. Basically, business opportunity and potential (that is, scrap/waste generation) are a function of population and business activity in a given area. Thus, it is not surprising to find the Miami area leading with 40 dealer/processors across the various scrap/waste material categories and Withlacoochee Regional Planning District (Region 5) trailing with only 2 dealer/processors.

The scope of individual dealer operations can be described as local in nature. Nearly three-fourths of the companies (71 percent) are single-location operations, and over two-thirds (68 percent) indicated a geographic scope of operations limited to the immediate vicinity (usually the county) surrounding their plant. Almost a quarter of the companies in the study (22 percent) had been in operation for twenty-five years or more; the oldest had been in business for eighty-five years.

From the telephone survey it was learned that there is a high degree of specialization in recycling; that is, dealer/processors tend to specialize in metals or paper—not both. Among the metals processors there is a distinct subgroup which specializes only in nonferrous recovery. Further analysis reveals a number of generalizations keyed to the fact of specialization. First, large metals dealers/processors usually handle both ferrous and nonferrous categories as processing requirements are compatible and having both products acts to balance out the highs and lows of demand. Smaller metals dealers inevitably choose to specialize in nonferrous metals as the equipment requirements are less rigorous (nonferrous metals are softer, easier to process, melt at lower temperatures), and the unit value of the product is relatively high. Paper dealer/processors, on the other hand, face entirely different physical collection and processing problems which require different labor and machinery inputs. In addition, sources of waste products also influence specialization since nonferrous metal, ferrous metal, and paper wastes are not produced by the same sources. The factors have created a community of well-defined specialists whose very specialization is based on the dual requirements of processing compatibility as well as specialized sources of supply.

Table 2.—Dealer/processor employee numbers and functions performed by commodity specialization

Characteristic	Percent of dealer/processors specializing in: Ferrous only OR ferrous and nonferrous	Nonferrous only	Paper	Other	Totals
Number of employees:					
1-10	56.7	86.2	47.8	100.0	62.3
11-20	20.9	13.8	17.4	---	18.9
21-30	7.5	---	21.7	---	8.2
Over 30	14.9	---	13.1	---	10.6
	100.0	100.0	100.0	100.0	100.0
Functions performed:*					
Grading function only	8.3	29.0	4.2	---	12.4
At least some mechanized processing**	91.7	71.0	95.8	100.0	87.6
Brokerage	21.9	12.9	75.0	---	29.2
Container rental/lease/purchase	38.4	29.0	54.2	50.0	39.2
Equipment rental/lease/purchase	1.4	---	4.2	---	1.6
(Base = n)	(72)	(31)	(23)	(2)	(129)

*Columns do not add to 100 percent due to multiple answers.
**Defined as some or all of the following: shredding, shearing, crushing, breaking up, baling, packing, or other mechanized form-alteration operations.
Source: Telephone survey.

The sizes of dealer/processor operations are shown in the top section of Table 2, which also relates this aspect to dealer/processor specialization. Large employment bases are limited to the largest ferrous metals processors and the largest paper stock dealers. As shown, a majority of the operations are quite small in an absolute sense, while nonferrous specialists show an extremely high concentration (86 percent) in the smallest employment size category.

A number of manufacturing and marketing functions are related to commodity specialization in the bottom section of Table 2. While many (29 percent) of the nonferrous dealer/processors provide a grading function only, all commodity specialties show high levels of involvement in mechanized processing activities (61 to 96 percent). These actual processing activities include: 1) alteration of scrap/waste materials in terms of size, form, and purity to meet specifications requirements; 2) the sorting of materials into predetermined product categories;

Table 3.—Amount of materials processed by major companies in 1976 compared with maximum processing capacity

Materials processed/ estimated maximum capacity	Total net tons--dealers specializing in: Ferrous only OR ferrous and nonferrous	Nonferrous only	Paper	Other	Totals
Total processed--1976	929,710	5,420	245,211	8,900	1,189,241
Maximum estimated capacity*	1,647,423	10,363	484,564	25,800	2,168,150
Ratio = Actual / Max.	56.4%	52.3%	50.6%	34.5%	54.9%
(Base = n)	(29)	(8)	(14)	(2)	(53)
Total processed by major companies in 1976*	764,803	---	165,711	---	---
Maximum estimated capacity--major companies	1,395,098	---	343,814	---	---
Ratio = Major companies / Total processed	82.3%	---	67.6%	---	---
Ratio = Major companies / Total capacity	84.6%	---	71.0%	---	---
(Base = n)	(12)	---	(7)	---	---

*Twelve metals dealer/processors with reported capital investment of over $1,000,000 and seven paper stock dealers with reported capital investment of over $500,000.

and 3) the "packaging" of materials through baling and other processes to insure efficient transportation to end-user markets.

In addition, Table 2 also reveals significant dealer/processor involvement in activities designed to facilitate the accumulation of materials which are then subjected to processing. Specifically, many dealers (between 29 and 54 percent by commodity category) are involved in container rental/lease/purchase programs. While not reported in the table, some dealers also provide extensive educational programs to promote the concept of resource recovery as a means of improving company profit performance by the conversion of former wastes to sources of revenue.

An additional insight provided by the data in Table 2 stems from a review of the extent of brokerage activity among the firms in each commodity speciality. Brokerage is practiced in all commodity areas as part of normal business operations, but paper processors clearly rely most heavily on the brokerage function as a means of competing in the marketplace since three out of four engage in this function.

Another significant indicator of the nature of dealer/processor organizations is the inventory of equipment utilized to collect and actually process scrap/waste materials. A subsample of fifty-six dealer/processors responding to the survey currently have in operation 203 pieces of processing equipment, 428 vehicles (including semitrailers), and 270 pieces of materials-handling equipment.

Table 3 gives major insight into the nature of dealer/processor channels for recyclables. The total amount processed and the total estimated capacity of fifty-three dealer/processors are compared to a subsample of twelve major metals dealer/processors and seven paper stock dealers. The concentration ratios of 82.3 percent and 67.6 percent for amounts processed and 84.6 percent and 71.0 percent for estimated capacity point out the significance of a relatively few large dealer/processors in each of the commodity groups compared.

A final revelation into the character of dealer/processor channels is given through an examination of principal sources of supply of scrap/waste materials for processing. Our research shows that the vast majority of scrap is either collected from traditional industrial accounts and other dealer/processors or brought to the plant and paid for "over-the-scale." While it is true that some paper stock dealers do actively pursue consumer-generated wastes via collection drives, the dealer/processor community is, on the whole, oriented toward traditional industrial/commercial waste generating sources which produce large quantities of waste materials on a continuous basis.

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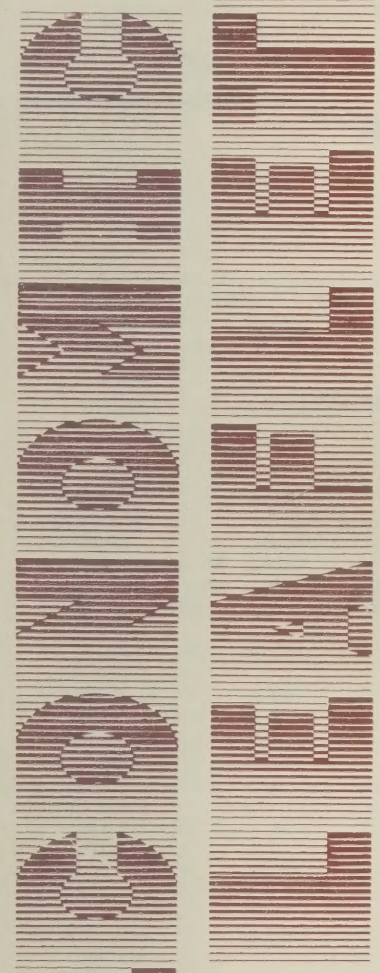

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Industrial growth strong in Florida

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Industrial employment in Florida has increased by 14,700 persons since the 1972 census, as indicated by the 1977 Census of Manufactures. The value of products shipped from Florida manufacturers exceeded $21 billion in 1977, an increase of $4 billion or 21 percent since 1976. The total number of establishments engaged in manufacturing has grown by 2,090 since 1972. Although this figure includes many small firms, it reveals a significant growth pattern in industry.

As Florida manufacturing continues to expand, the Food and Kindred Products, Transportation Equipment, Electric and Electronic Equipment, and Apparel and Other Textile Products industries lead in employment and value of output.

The Florida economy, originally developed around agriculture, has had a brief but impressive manufacturing history. Strong economic growth in Florida over the years has been dependent upon several key variables, one of which is an administration which envisions benefits derivable from supportive legislation. Tax abatement plans and other incentives are often means to this end. Another major factor in Florida's expansion has been the continual growth of a supportive labor force. Market availability and adequate transportation facilities also rank high in industrial location decisions.

During the sixties a move was well underway to augment the stalwart industries of phosphate, pulp and paper, and citrus with expansion in the chemical, electronics, and food industries. As these industries developed, so did support facilities. Goals envisioned during the early sixties had begun to take form by the seventies. Manufacturing is a vital and ever-increasing segment of the Florida economy.

Value Added by Manufacture, the net selling value of all products produced less the cost of materials, exceeded $9,332 million in Florida during 1977, an increase in dollar amount of 61 percent over 1972. In real terms, the gain above 1972 is 11 percent, due mainly to rampant inflation during the late seventies. The gain, still significant, was realized mainly in the Transportation, Electric and Electronic Equipment, Instruments and Related Products,

Chemicals and Allied Products, and Food and Kindred Products industries. Concomitant increases in total employment were also noted in these industries. Areas which led in Value Added by Manufacture were Miami, Tampa-St. Petersburg and Jacksonville.

Value of Shipments is the total received or receivable net selling value of all products shipped FOB plant. Value Added by Manufacture in 1977 amounted to 43 percent of the total $21,928.3 million Value of Shipments from the aggregate of Florida industries. During 1976, Value Added by Manufacture amounted to 46 percent of the shipments total. The decrease in Value Added resulted from an increase in cost of materials in both absolute and real terms.

Expansion down

New Capital Expenditure, a measure of capital expansion or additions to already existing facilities, is a primary indicator of anticipated growth in manufacturing. New Capital Expenditure reached a high point in 1976 immediately following the 1974-75 recession. In 1977, expenditures on capital tapered off by $115 million. According to the 1979 Annual Report of Announced New and Expanded Industrial Plants, 109 firms intended to build or augment existing facilities and employ twenty or more persons. Although investment in 1977 was down, 550 firms had plans to expand in 1979. With soaring interest rates, many of these plans will be put aside. New Capital Expenditure in 1977 was heavily concentrated in three SMSAs: Miami, Tampa-St. Petersburg and Jacksonville. Counties expected to gain strongly in 1980 are Dade, Broward, Pinellas, Hillsborough and Orange. Industries ex-

Figure 1.—Value of shipments by Florida manufacturers, 1963-1977

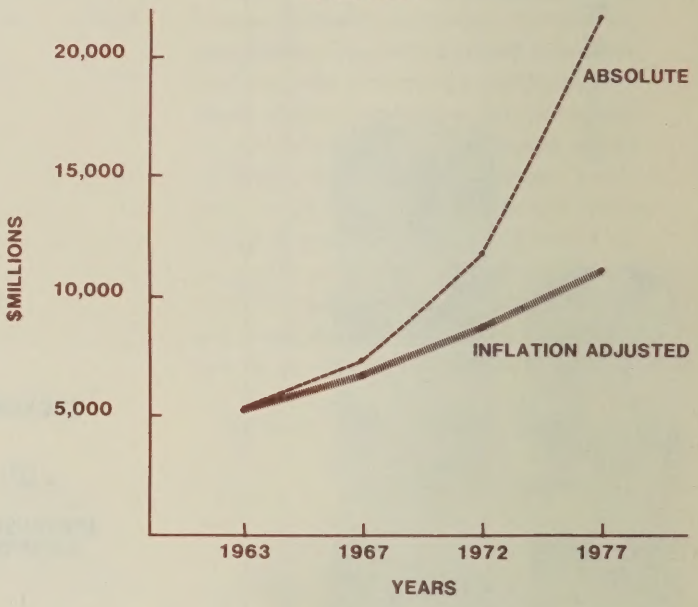

Table 1.—Census of Manufactures data by industry group in Florida, 1977

Industry groups	1977 All establishments Total (number)	1977 All establishments With 20 employees or more (number)	1977 All employees Number (000s)	1977 All employees Payroll (million dollars)	1977 Value added by manufacture (million dollars)	1977 Cost of materials (million dollars)	1977 Value of shipments (million dollars)	1977 New capital expenditures (million dollars)	1972 All employees (000s)	1972 Value added by manufacture (million dollars)
All industries	12,366	2,909	357.6	4,128.5	9,332.1	12,763.9	21,928.3	752.0	342.9	5,786.8
Food and kindred prods.	770	313	45.6	490.9	1,611.3	3,929.6	5,545.6	108.6	44.3	968.7
Tobacco products	52	11	2.7	19.3	32.2	43.6	75.7	0.8	4.4	52.6
Textile products	121	36	4.8	37.3	65.5	69.0	134.7	3.7	3.7	56.7
Apparel, other textile products	1,280	392	32.0	211.4	402.5	337.1	734.9	8.9	28.4	232.4
Lumber and wood products	1,312	207	16.4	151.8	309.4	459.0	762.3	33.7	20.2	264.1
Furniture and fixtures	546	122	9.3	82.9	169.8	156.8	323.4	7.6	10.2	121.7
Paper and allied prods.	159	74	15.4	229.1	498.6	862.7	1,357.9	79.8	15.8	351.7
Printing and publishing	1,965	245	29.8	340.1	791.3	379.5	1,168.8	56.9	26.6	466.4
Chemicals and allied products	470	141	22.2	310.6	897.1	1,835.0	2,696.2	143.9	19.2	516.2
Petroleum and coal products	59	13	0.8	9.7	28.8	77.2	105.4	2.7	0.8	26.5
Rubber, miscellaneous plastic products	407	104	10.7	95.9	204.7	223.6	420.4	24.1	9.0	123.9
Leather and leather products	80	26	3.9	27.2	46.0	38.5	82.7	1.7	3.5	26.8
Stone, clay, glass products	702	190	14.7	177.1	430.9	479.1	893.6	42.1	18.5	375.3
Primary metal industries	112	50	4.8	55.3	115.8	245.4	358.7	9.4	4.0	74.6
Fabricated metal prods.	977	270	24.4	281.5	678.7	788.9	1,438.1	31.5	25.7	425.4
Machinery, except electrical	1,049	184	20.1	285.5	519.0	397.1	899.2	44.1	17.0	287.6
Electric, electronic equip.	506	158	41.6	520.6	1,144.0	682.7	1,767.1	83.7	33.5	580.9
Transportation equip.	677	176	36.5	532.1	1,040.5	1,543.9	2,601.1	41.4	40.7	700.2
Instruments, related products	248	53	8.6	89.2	204.6	108.8	311.8	18.6	5.4	68.4
Miscellaneous manufacturing industries	669	73	7.0	61.1	138.5	118.8	252.7	9.1	5.9	67.7

Note: These data are preliminary figures and subject to change.

Table 2.—Census of Manufactures data by SMSAs and non-SMSA counties in Florida, 1977

	1977								1972	
	All establishments		All employees		Value added by manufacture	Cost of materials	Value of shipments	New capital expenditures	All employees	Value added by manufacture
	Total (number)	With 20 employees or more (number)	Number (000s)	Payroll (million dollars)	(million dollars)	(million dollars)	(million dollars)	(million dollars)	(000s)	(million dollars)
FLORIDA	12,366	2,909	357.6	4,128.5	9,332.1	12,763.9	21,928.3	752.0	342.9	5,786.8
SMSA										
Bradenton	136	24	4.2	49.8	187.5	234.9	418.9	8.1	4.6	84.2
Daytona Beach	254	50	6.5	69.5	166.2	120.7	286.1	10.1	5.7	75.1
Ft. Lauderdale-Hollywood	1,484	274	28.7	335.4	792.1	527.7	1,294.5	54.4	25.0	387.9
Ft. Myers	193	36	3.0	29.4	68.9	63.4	130.7	5.3	2.3	31.9
Gainesville	120	29	4.1	41.3	96.6	99.3	195.8	7.8	3.8	53.4
Jacksonville	810	242	29.9	373.4	901.0	1,920.2	2,807.0	87.7	28.4	615.5
Baker County	(NA)	(NA)	(NA)	(NA)	(NA)	(NA)	(NA)	(NA)	(NA)	(NA)
Clay County	(NA)	(NA)	(NA)	(NA)	(NA)	(NA)	(NA)	(NA)	(NA)	(NA)
Duval County	667	216	25.5	316.0	764.7	1,680.2	2,429.8	53.4	24.2	505.0
Nassau County	56	11	2.6	39.2	98.1	176.1	275.9	(NA)	2.4	72.9
St. Johns County	37	8	1.2	12.1	21.7	25.9	48.4	1.6	1.2	22.9
Lakeland-Winter Haven	343	133	16.7	199.3	503.4	1,339.8	1,815.5	68.2	14.9	333.9
Melbourne-Titusville-Cocoa	295	63	14.1	191.3	369.0	191.8	581.7	30.4	13.6	243.0
Miami	3,412	890	86.3	836.2	1,765.5	1,824.7	3,558.0	120.6	85.9	1,219.0
Orlando	823	189	24.9	322.4	768.2	814.5	1,578.3	46.9	25.4	497.7
Orange County	575	137	19.5	271.4	672.4	662.0	1,336.8	38.3	20.6	419.1
Osceola County	51	12	0.9	8.1	14.8	16.2	31.3	1.1	1.0	13.1
Seminole County	197	40	4.5	42.9	81.0	136.3	210.2	7.5	3.8	65.5
Panama City	94	19	2.6	34.6	56.1	114.0	169.2	4.1	2.6	49.5
Pensacola	206	46	12.8	178.9	402.0	494.1	891.8	64.8	14.0	298.2
Escambia County	175	39	11.3	163.0	383.3	437.3	815.1	(NA)	12.5	266.1
Santa Rosa County	31	7	1.5	15.9	18.7	56.8	76.7	(NA)	1.5	32.1
Tallahassee	120	18	2.1	22.1	51.5	55.0	105.8	5.0	2.2	30.4
Leon County	(NA)	(NA)	(NA)	(NA)	(NA)	(NA)	(NA)	(NA)	(NA)	(NA)
Wakulla County	(NA)	(NA)	(NA)	(NA)	(NA)	(NA)	(NA)	(NA)	(NA)	(NA)
Tampa-St. Petersburg	1,752	438	59.7	691.3	1,570.0	1,982.5	3,504.5	97.4	59.8	951.5
Hillsborough County	803	250	32.1	377.4	851.0	1,430.6	2,252.8	51.3	33.7	576.6
Pasco County	83	11	2.5	25.1	149.2	107.6	256.0	(NA)	2.3	40.5
Pinellas County	866	177	25.1	288.8	569.8	444.3	995.7	(NA)	23.8	334.4
West Palm Beach-Boca Raton	567	114	21.1	331.0	601.4	1,441.2	2,024.1	48.8	18.0	296.8
NonSMSA										
Collier	72	6	0.5	5.3	13.0	7.3	19.9	0.5	0.5	5.3
Columbia	64	17	1.8	15.6	28.2	34.0	61.9	1.8	0.9	13.1
Dixie	38	4	0.5	4.9	11.0	15.6	26.2	(NA)	0.6	9.6
Gadsden	48	10	1.0	8.9	22.4	34.2	56.1	0.7	1.2	11.2
Highlands	35	7	0.6	4.9	13.0	22.2	34.9	1.2	0.6	8.7
Holmes	37	4	0.6	4.1	7.7	6.3	13.9	0.3	0.3	1.7
Indian River	46	10	3.3	37.3	83.1	83.3	165.4	4.6	2.3	33.8
Jackson	48	15	1.9	15.1	29.7	34.0	61.7	3.9	1.6	18.1
Lake	104	29	2.2	19.9	73.9	129.0	202.2	5.7	2.2	60.4
Madison	37	6	0.9	7.3	24.4	91.2	114.7	0.9	0.9	16.1
Marion	150	43	3.4	34.1	71.9	134.9	206.6	4.9	3.6	61.3
Martin	64	13	1.8	22.5	45.5	44.4	91.3	2.4	1.2	32.2
Okaloosa	78	16	1.9	18.3	33.5	25.6	58.8	2.0	1.3	19.5
Putnam	64	10	3.0	39.4	90.1	123.2	212.1	8.1	3.3	64.0
St. Lucie	64	16	1.6	21.4	77.4	123.7	202.8	8.0	1.4	26.8
Suwannee	30	5	1.0	7.5	11.8	30.6	42.4	0.9	1.1	20.2
Taylor	38	15	1.9	25.6	86.9	101.2	184.9	(NA)	2.0	39.3
Walton	18	5	0.6	3.9	8.3	24.9	33.2	0.5	0.4	4.7

NA Not available.

periencing notable increases in capital in 1977 were the Food and Kindred Products, Chemicals and Allied Products, Electric and Electronic Equipment, Transportation Equipment, and the Paper and Allied Products industries. According to the *Statistical Abstract of the United States*, Florida New Capital Expenditure relative to nationwide capital expenditure during 1977 proceeded at an average to above-average pace.

Total employment in the manufacturing sector during 1977 was 357,600 persons. This is a 4.2 percent increase over 1976 employment levels and displays a continual growth pattern following the 1974-75 recession, when industrial employment was at its lowest point since 1971. Industries strongly tied with construction were hurt more severely than others.

Persons employed in the manufacturing sector made an average $11,545 during 1977. There are several industries with notable aberrations. On the high side were the Paper and Allied Products; Chemicals and Allied Products; Stone, Clay and Glass Products; and Fabricated Metal Products. Below the average were the Leather and Leather Products, Apparel and Other Textile Products, Textile Mill Products, and Rubber

and Plastics Products. Production workers in Florida industries made an average $4.80 per hour or approximately $9,500 per year, compared with a national average of $5.06 per hour. Note that although Florida wages are below average, the disparity has been narrowing and will continue to do so.

Employment in Florida manufacturing, growing steadily, is the result of integrated transportation facilities, market proximity, climate and strong growth expectations. Furthermore, a diversified labor force of both skilled and unskilled workers supports and attracts industry throughout the state.

Regional patterns

A clear line cannot be drawn between the northern, central and southern manufacturing regions of the state. Examples are the Transportation Equipment, Electric and Electronics Equipment, and Lumber and Wood Products industries, all concentrated in certain areas but also appearing throughout the state. The panhandle industries center around natural woodland resources with the Lumber and Wood Products, Printing and Publishing, and Paper and Allied Products Industries leading. The Fabricated Metal Products industry is also noted in north Florida. Industries are not heavily concentrated in the northern part of the state due to low accessibility to international markets and tax structures which are more favorable in Alabama and Georgia.

Industrial growth in central Florida has abounded at an above-average rate. Factors contributing to this increase have been a steady influx of workers, continual demand for products, and growth of service-related firms. Projections of expansion for the "golden belt" region (Tampa-Orlando-Daytona) include a labor force of both skilled and unskilled workers, growth of markets, and improved transportation.

In Polk County, phosphate mining continues to be a leading employer along with the Food and Kindred Products industries. The Chemicals and Allied Products industry in Polk County increased employment by 2,404 workers between 1972 and 1977. Orange County employs heavily in the Paper and Allied Products, Electrical and Electronic Equipment, Machinery, and Food and Kindred Products industries. In the Tampa-St. Petersburg area, Printing and Publishing; Chemicals and Allied Products; Stone, and Clay and Glass Products; and Electrical and Electronic Equipment industries are well-entrenched employers. Pinellas and Hillsborough counties have had significant employment growth in the Instruments and Printing and Publishing industries.

South Florida houses a diversity of manufacturers and remains the strongest region in Florida industry. With proximity to international markets, several high-technology industries, and well-developed support facilities, the southeastern counties are industrially mature. Dade and Broward counties lead in total number of reporting units for almost all industrial classifications. Furthermore, both counties lead in increased production employment over the past five years. Value of Shipments for Dade County alone topped $3,558 million in 1977. New Capital Expenditure in Dade, $120.6 million, was the largest for any county. Adjacent Broward County is led by the electronic-related manufacturers. The electric-electronic industries in Florida employed 10 percent of all production workers during 1977. Both Dade and Broward have had twenty to fifty new plant announcements during 1979. Only Pinellas County had more plants planned.

Government incentives

The present Graham administration has geared up for a "promote Florida" campaign. Marketing Florida to various industries throughout the country is the job of Lieutenant Governor Wayne Mixson. Presently engaged in a target marketing approach, the administration is considering the needs of individual industries and developing packages to try and meet them.

Local governments, to which many of the benefits accrue, have been attracting industry through land consideration and property tax reduction plans.

With talk of tax incentives at both the state and local levels, a tax structure more conducive to industry should emerge in 1980. Florida's neighboring states already have tax structures which are more favorable to industry. The administration is hoping to approximate these advantages and then let Florida's reputation win industry over.

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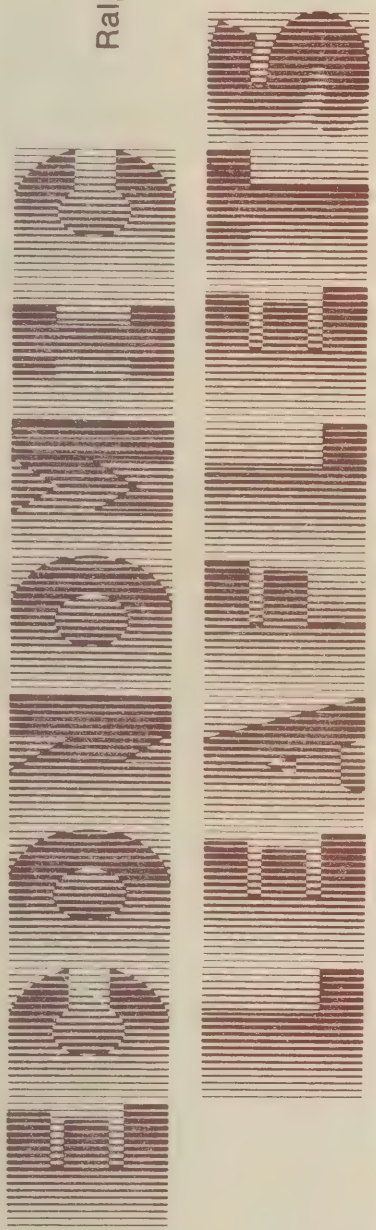

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Pilot telephone survey pinpoints differences in Duval, Sarasota counties

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Wen-Fu P. Shih

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Since 1970, Florida's population has grown by 32 percent, representing a net addition of more than two million persons. Demand for more detailed demographic and seasonality information has increased as the impact of these new residents on the state economy increases.

The Bureau of Economic and Business Research (BEBR), University of Florida, has developed a survey research program to generate economic and demographic data on the characteristics of Florida's households. As a pilot study for this program, the BEBR introduced its telephone survey in Sarasota County during January and February, 1980. In April, 1980, the Bureau completed its second pilot study by conducting a telephone survey in Duval County.

Sarasota and Duval counties were chosen because of their contrasting characteristics. Sarasota County is relatively small in area, rapidly growing, and has a population displaying highly seasonal characteristics. In contrast, Duval County is large, slow-growing, and has a more stable, less seasonal population. From 1970 to 1979, Sarasota's population increased by almost 60 percent while Duval's population increased only 7 percent. In terms of population per square mile, Sarasota has grown by more than 150 percent over the last two decades while Duval County has increased by only 24 percent.

Some remarkable contrasts were found in our pilot-study household surveys. The estimated characteristics of the households and the residents in Duval and Sarasota counties are presented in Table 1.

About one-third of the Duval population was estimated to be younger than 18 years and less than 9 percent was 65 and older. In contrast, only 16 percent of the population was estimated to be younger than 18 and more than one out of every three residents was 65 and older in Sarasota County.

The age distribution differences have contributed to different household sizes. In general, a younger household has more household members. Therefore, in Duval County average household size was 2.75 persons compared to 2.35 in Sarasota County. About three out of every four households in Sarasota County had only two persons or less, while only half of the households in Duval were that small.

There were noticeable differences in the distribution of household incomes. In Duval County more than 28 percent of the households had incomes of $10,000 or less, and only 7 percent earned more than $35,000. In contrast, only 18 percent of Sarasota County households had incomes $10,000 or less but more than 15 percent had incomes above $35,000. This result is comparable to the 1978 per capita income estimated by the Bureau of Economic Analysis — $7,484 for

Table 1.—Demographic characteristics of residents in Duval and Sarasota counties, spring, 1980

		Duval County (percentage)	Sarasota County (percentage)
Age	Under 18	29.1	16.3
	18-44	43.0	24.8
	45-64	19.1	25.6
	65 and older	8.8	33.3
	Total percentage	100.0	100.0
Household size	1 person	16.5	15.7
	2 persons	37.1	57.4
	3 persons	18.6	12.6
	4 persons or more	27.8	14.3
	Total percentage	100.0	100.0
	Average household size (persons)	2.75	2.35
Household income	Less than $10,000	28.2	18.2
	$10,000-$20,000	40.1	42.4
	$20,001-$35,000	24.8	24.2
	Over $35,000	6.9	15.1
	Total percentage	100.0	100.0
	Household median income	$16,800	$18,000
Sex	Male	47.2	46.2
	Female	52.8	53.8
	Total percentage	100.0	100.0
Marital status	Currently married	48.0	66.8
	Divorced, separated or widowed	12.0	9.7
	Never married	40.0	23.5
	Total percentage	100.0	100.0
Household head	Husband-wife	64.3	75.0
	Single male	8.3	3.7
	Single female	23.7	17.7
	Other	3.5	3.4
	Total percentage	100.0	100.0
Housing unit	Single-family house	70.2	59.6
	Multifamily house	24.1	29.7
	Mobile home	5.7	10.2
	Total percentage	100.0	100.0

Table 2.—Respondents' characteris and Sarasota cou

Education completed	Elementary
	High school
	College
	Total percentage
Length of residence in Florida	Less than 1 year
	1-5 years
	6-10 years
	10 years or more
	Native Floridian
	Total percentage
Previous residence	New England
	Middle Atlantic
	Southeast
	Midwest
	West
	Foreign country
	Total percentage
Reason for moving to Florida	Employment
	Family
	Climate
	Health
	Retirement
	Total percentage
Destination of respondents away from home one month or more	New England
	Middle Atlantic
	Southeast
	Midwest
	West
	Foreign country
	Total percentage
	Percentage of respondents a

Duval and $9,310 for Sarasota.

The sex distribution in the two counties was the same, 53 percent male and 47 percent female. This is also the statewide distribution.

The age distribution apparently influenced the residential marital status and household-head distributions. Duval's younger populations contributed to the higher proportion of "never married" persons and lower percentage of "currently married" compared with Sarasota's residents. The "never married" groups were 40.0 percent and 23.5 percent in Duval and Sarasota, respectively. On the other side, the "currently married" group was 48 percent in Duval and 66.8 percent in Sarasota. This higher proportion of "never married" in Duval yielded 10 percent more single heads-of-household in Duval than in Sarasota County.

The survey data suggested some differences in the types of housing in the two counties. More than 70 percent of the households lived in single-family dwellings in Duval County, compared to less than 60 percent in Sarasota County. The residents of Sarasota County were more likely housed in condominiums, apartments or mobile homes, apparently because they were older and had smaller households.

Table 2 presents the survey respondents' characteristics and seasonal mobilities. A survey respondent was the adult age 18 or older who responded to the telephone interview when his/her household was selected in the survey sample. The respondents' characteristics can provide information about the general characteristics of the entire adult population in Duval County and Sarasota County.

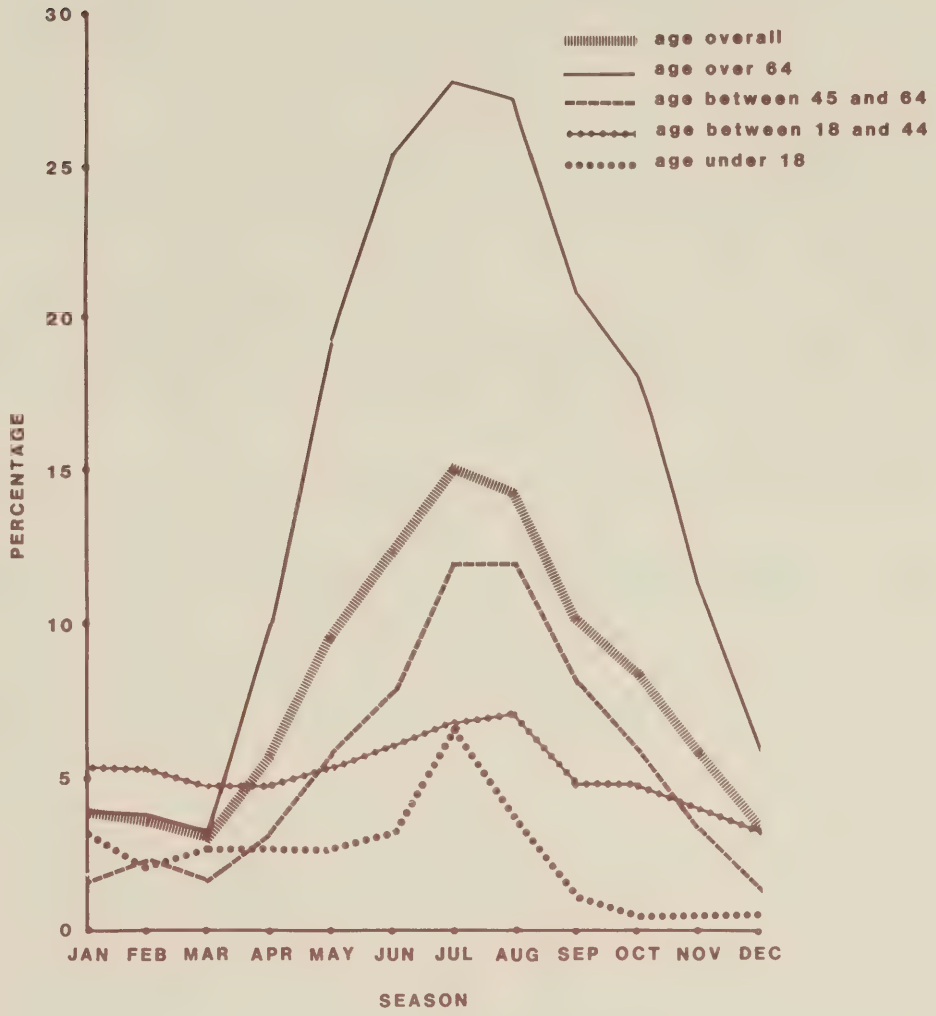
It was not surprising that the state's richest county, Sarasota, reported higher levels of education among the respondents; 52 percent had completed some college, or had degrees, or had postgraduate education, compared to 35 percent in Duval County.

One of the most striking differences between the two counties is the length of the respondent's residence in Florida. More than one-third of the respondents in Duval County were native Floridians, while only 5.4 percent in Sarasota County were. Furthermore, compared to only 15 percent of Duval residents who were "relative newcomers" who had lived in Florida five years or less, more than 36 percent in Sarasota County were in this category.

and seasonal mobilities in Duval s, spring, 1980

Duval County (percentage)	Sarasota County (percentage)
3.0	0.4
61.9	47.7
35.1	51.9
100.0	100.0
4.9	4.6
10.3	31.6
12.3	27.8
39.8	30.6
33.1	5.4
100.0	100.0
5.9	10.2
11.8	29.7
53.9	14.1
14.2	40.1
8.8	3.2
5.4	2.7
100.0	100.0
34.1	11.1
43.5	14.5
7.6	54.0
2.1	7.7
12.7	12.5
100.0	100.0
2.3	12.2
0.0	24.3
76.8	23.5
9.4	30.0
9.3	4.8
2.3	5.2
100.0	100.0
3.1	20.0

Figure 1.—Percentage of Sarasota County residents away from home monthly in 1979 by age group



In addition to these newcomers, about 28 percent of the residents in Sarasota had migrated to the area in the past six to ten years, as would be expected considering the rapid growth rate of Sarasota County in the last decade.

A significant factor illustrating the unique characteristics of each county was the main reason given by the respondents for moving to Florida. The majority of people who moved from out of state to Duval County came for employment or family reasons (77.6 percent), while the majority of residents in Sarasota County moved because of the warm Gulf Coast climate, their health, or their retirement (74.2 percent).

Where did those migrants come from? This is another divergent factor shown by two counties' respondents. More than half of the respondents who migrated to Duval County were from the Southeast, especially Georgia or South Carolina, while only 14 percent came to Sarasota from those areas. Migrants from New England and the Middle Atlantic states totaled 17.6 percent and 40.0 percent in Duval County and Sarasota County, respectively. Only 14 percent of the respondents in Duval came from the Midwest, compared to 40 percent in Sarasota.

Another contrast characteristic found in the surveys was the seasonality of the residents. Respondents were asked whether they resided away from home one month or more in 1979. If the answer was yes, they were further asked their destinations and travel seasons. The data showed that 20 percent of the Sarasota County residents had gone away one month or more, while only 3 percent of the residents in Duval County had done so. The peak travel months for Sarasota residents were, as expected, July, August, and September (10-15 percent). The age group causing most of this seasonality was obviously those aged 65 and older. In the peak month of July, 1979, about one out of every three retirees went away from the county (Figure 1). Of those traveling, 30 percent went to the Midwest, 24 percent to the Middle Atlantic and 23 percent to the Southeast. Duval County residents did not show the seasonal differences over the year. However, among those who did go away from home a month or more, the majority (77 percent) went to the Southeast area.

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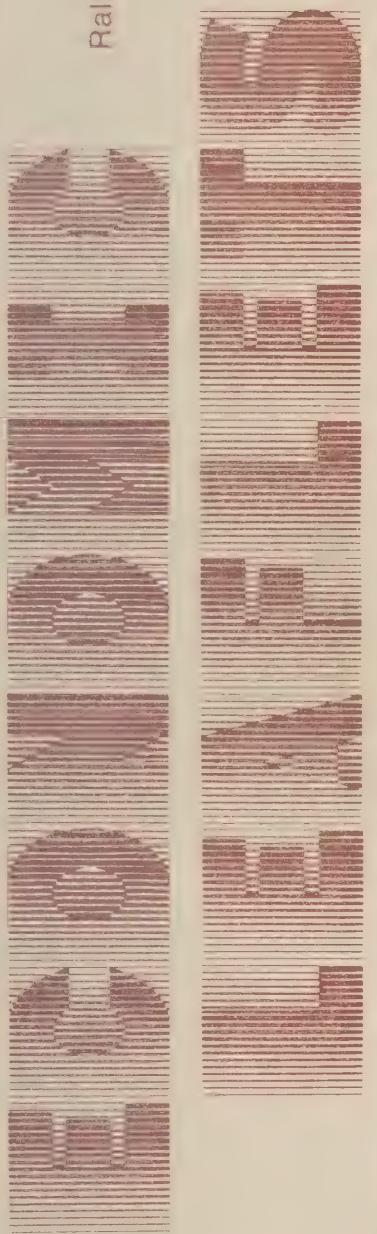

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Condo-conversions: Exaggerated fears

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This article is a condensed version of an in-depth study commissioned as an independent research project by the Florida Association of Realtors. The authors wish to also acknowledge Professor William Landsea, University of Miami, and M. Godfrey Parsons, Central Michigan University.

The issue of condominium conversions is of great concern to many Floridians. This fact is readily discernible from research by these authors, from reports in the media, and from protests of many tenants who are directly and unexpectedly confronted with conversions of their apartments to condominiums.

In 1979 there were 16,145 condominium conversions in Florida, according to the Division of Florida Land Sales and Condominiums. The prolonged effects of conversion on the availability of rental housing, the trauma of the displaced persons, and the plight of the "condo-casualties" give rise to an increasing pressure for action, protection, and the general amelioration of the problems presented in the media.

The authors surveyed conversions in Dade, Broward and Palm Beach counties—the Florida Gold Coast—and in Pinellas County, which reported the third largest number of conversions in the state during 1979. The four counties contain more than 11,000 apartments that were converted from January, 1979, to January, 1980, or approximately 68 percent of all condominium conversions during the period.

This research cannot begin to supply answers to many questions which may have been raised, but it does present information on the impact of condominium conversion in Florida on those most directly affected: the purchasers of converted apartments and the persons who move because they cannot or do not purchase.

Methodology

Identification of conversions was obtained from or confirmed by the property appraiser's office in each of the four counties. Sampling of individual conversions was in proportion to total conversions.

Tables of random numbers were used to select buildings and persons for the survey, with small buildings (less than eight units) excluded prior to the random selection to insure that the findings would be most representative of typical conversions. The twenty-nine buildings selected in the four counties contained from 8 to 504 units and included all types of structures: highrise, midrise and lowrise.

Three hundred thirty interviews were conducted. Persons interviewed included both purchasers and former residents who moved from the conversions. Respondents included three separate classifications:

1. Purchasers who were tenants at the converted property; i.e., tenants who purchased their own apartments.
2. Purchasers who were not previous tenants at the property; i.e., the "outside" purchasers.
3. Former tenants who did not purchase, and therefore moved from the condominium conversion.

This triclassification technique provided maximum information and permitted cross-comparisons and contrasts between and among the groups surveyed.

A telephone survey was used with the reservation that if the person selected could not be located by phone or did not respond to three callback attempts the next person on the random list was selected. Findings are believed to be accurate within plus or minus five percentage points from the "true" proportion.

Other relevant research

Previous studies and reports were reviewed and utilized in the development and design stages of this study. While a few very informative "reports" were found on condominium conversions, all lacked the rigor of empirical research. To illustrate, a recent report by the Division of Florida Land Sales and Condominiums to Governor Bob Graham on condominium conversion includes very relevant information. The modest section on the "Psychological Impact on the Tenant," however, is based upon inquiries and complaints received by the division, plus the experience and opinions of its staff.

Relevant studies based on empirical evidence were conducted in Washington, D.C.; Evanston, Illinois; and San Francisco, California. These studies suggest several generalizations regarding the characteristics of households which either have been displaced by the conversion process or are living in buildings undergoing conversion. Many of these generalizations have been substantiated by this study.

Summary of major findings

Approximately 40 percent of the tenants in south Florida purchase their condominium conversions, although this percentage varies considerably in any given building. This conclusion is similar to the Washington, D.C., study that found 32 percent of the households deciding to purchase. The report to Governor Graham by the Division of Florida Land Sales and Condominiums estimated that 25 to 50 percent of the tenants in a converted rental building will purchase the unit which they rented.

As widely reported and believed, the majority of tenant-purchasers did have negative feelings when they learned of the conversion. However, while these reactions were indicated by 57 percent of the sample, it may well have been assumed that the number would have been higher. The research disclosed that 43 percent did not have negative feelings; in fact, 25 percent were best described as positive, while 18 percent were neutral in their reactions.

The initial reactions of those who moved were remarkably similar. The majority (58 percent) were negative and hostile, although the percentage might have been expected to have been greater. In the sample of the tenants who moved, 36 percent were neutral and 6 percent were considered as having positive feelings. The hostility of the tenants experiencing conversions, therefore, is either less than is popularly believed or their hostility and negative feelings tend to decline rapidly following a purchase or a relocation.

The reasons given for purchasing a condominium conversion are quite similar for both the tenants who buy and the outside purchasers. Location and building characteristics were most frequently cited, followed by financial considerations relating to tax advantages and inflationary hedges. The tenants who purchased did not appear to be as widely influenced by feelings of being forced or compelled to buy as popularly supposed; they gave responses such as "had to buy" or "couldn't find anyplace else" in just a few instances.

By contrast, financial considerations were among the most frequently mentioned reasons for not purchasing. Of those who moved, 46 percent said "the price was too high" or "could not afford to buy." Similar results were found in the Washington, D.C., study, where approximately 50 percent of those who moved cited financial reasons for not purchasing. In south Florida, dissatisfaction with the building represented 29 percent of the responses, while reluctance to own and other reasons were of lesser significance. Age—being "too young" or "too old"—was seldom mentioned as the reason for not purchasing.

Those who moved and those who purchased held fast to their decisions and appeared largely convinced that they made a wise choice. Those who moved were slightly less sure of themselves, and 6 percent actually regretted not having purchased.

Eighty percent of the outside purchasers who moved into the converted apartments were from within the same counties. About half of these released a rented apartment by purchasing the condominium, and another 10 percent moved from a rented home. This finding that persons purchasing conversions release other rental property in the area is quite significant, as it strongly suggests that the net displacement effect of the conversions on the supply of alternative rental housing may not be as great as the number of converted apartments seems to suggest. This becomes particularly apparent when one recognizes that many of those who moved from the conversions did not choose to rent another apartment. Of the movers, 12 percent purchased a condominium in another building, 8 percent purchased a home, and 2 percent rented a home.

Since it was believed that the tenants who moved from condominium conversions were the most likely to be harmed by an unanticipated displacement, considerably more data were obtained from this group. Among the findings was that a strong preference existed for relocation near the original apartment.

The majority of those who moved

were able to find such accommodations. Sixty-one percent found a location in the same neighborhood, with 18 percent reporting locations nearby or less than two miles away. Only 7 percent located more than ten miles away.

Similar findings on proximity of relocation were found in other studies. In Washington, D.C., 50 percent of the displaced households were able to locate alternative housing within the same neighborhood, while another 15 percent relocated within the same quadrant of the city. The San Francisco study concluded that there was only a slight dispersal of households away from the former neighborhood.

The vast majority of tenants who moved (77 percent) rented other apartments but 12 percent of those tenants who did not purchase their original apartments did purchase condominiums in another building.

The tenants who relocated were generally satisfied with their change in residence, at least after the initial reactions had passed and their selection had been made. In terms of size, 54 percent reported that their new residence was larger; 26 percent said it was the same.

As to their judgment of convenience, about 90 percent believed their new location was about the same or more convenient. When an overall quality perception was requested, 54 percent responded that the new residence was better or much better suited to their needs. In the San Francisco study, 57 percent of the displaced households considered their new residence either more desirable or at least as desirable as their former residence.

In all counties surveyed, the average rent paid by tenants who moved due to conversion increased. For the four-county area, average monthly rent went from $303 per month to $334 per month, an increase slightly greater than 10 percent. The increase was less than expected, particularly when one considers the inflationary pressures generally exerted upon rental units in south Florida.

The average time used to find alternate housing ranged from 1.9 months in Broward County to 3.1 months in Palm Beach County, with the four-county average relocation time being 2.3 months. It was similarly noted in the Washington and San Francisco studies that, despite the reports of a tight rental market, displaced households generally were able to locate alternative housing in one to two months.

There was also little correlation between the time it took to arrange for suitable alternate housing and the time remaining on the unexpired lease (or allowed by the developer or through other extensions). Responses strongly suggest that lease extensions and the like which extend total available search time beyond six months are perhaps of psychological benefit but are of little practical significance.

The results of the study suggest several generalizations regarding the residential status and mobility of the tenants who moved rather than bought their condominiums. More than one-third of this group did not consider themselves permanent residents of their "old" neighborhood. When the tenants who moved were compared to the tenant purchasers and the "outside" purchasers relative to the number of moves made during the past five-year period and ten-year period, it was seen that the tenants who moved were characteristically a more mobile group.

When considered with other comparative demographic data for those who purchased condominium conversions, the tenants who moved because of conversions (1) are found to be younger; (2) tend to have larger households; (3) have fewer retired adults, but include more professionals, unemployed persons and students; and (4) tend to have a history of greater mobility.

Additional observations

Our research leads us to recognize that well over 9,000 apartment households were shocked, confused, frightened, worried, and sometimes ill as a result of the condominium conversions in the state during the study period. The alarm of the tenants who could afford to buy, and those who did buy, was roughly equal to the alarm of the tenants who moved because they could not or would not buy. To no small extent, their alarm was based upon a fear for their future and a confusion about what to expect or what alternatives were available. Our research proves that the trauma of conversion is a shared experience felt in equal proportions by all tenants affected, both purchasers and movers alike.

Media coverage has probably contributed in no small measure to the fears of many apartment residents although, of course, not deliberately so. Talk of disappearing supplies of rental apartments due to conversion and reports that tenants are a captive prey for converters and developers who exploit a tight housing market for fantastic financial gain are relatively abundant.

In the face of alarming "news" and confusion, certain realities should be understood by all concerned, if only to prevent exaggerated fears from becoming the basis for and cause of exploitation. Fear associated with uncertainty is best alleviated with factual information.

While it is impossible to say that the "condo-casualty" is a myth, the fears associated with the current "crisis" are grossly exaggerated. Exaggerated fears are especially unfortunate if they lead to panic purchasing, but we found little evidence that a "buy or else" promotional strategy was successful. To the contrary, resentment of pressure was evident, and only 4 percent of those who purchased their apartments indicated that they had little or no choice in the matter. The finding that many "movers" went on to purchase other condominiums may well indicate that overanxious pressure selling resulted in lost sales among tenants who were originally predisposed to purchase their apartments.

The fears and anxieties experienced, as well as the hostility, while considerable, are probably over-represented in the media, since it is presumed that in the absence of statistical data the tendency would be to report on protests rather than facts.

While we did not investigate the low vacancy rates reported in south

Florida, we were unable to detect or verify as statistically accurate any indication of such a lack of vacancies. We suspect that the 1.2 percent vacancy rate reported in the report of the Division of Land Sales and Condominiums to the governor is not accurate. With the vacancy factor being of such critical concern, particularly in a tourist area, we were distressed to find that accurate information is lacking and "guesstimates" are utilized even in the formulation of legislative action of far-reaching social and economic implications.

Our research does provide insight into the impact of condominium conversions on vacancy rates for rental apartments. We believe it is now possible to establish a causal or functional relationship between vacancy rates and conversion activity. The relationship is greatly overstated, particularly by those who equate the number of apartment conversions with a similar depletion in vacant rental apartments available in any given time period. Such a presumption is entirely unwarranted.

Utilizing percentages derived from our research in combination with data obtained from the Division of Land Sales and Condominiums, approximations of the true vacancy impact of conversions can be illustrated as follows.

Of the 16,145 conversions in 1979, 40 percent or 6,458 units were retained by tenant purchasers; hence competition for vacant apartments was not increased by them. Of the other persons who purchased the conversions and moved from other residences, 29 percent or 4,747 households moved from other rental apartments, decreasing competition for apartment rentals in 1979. Further, of the 60 percent of the persons who moved from the 16,145 conversions, only 7,459 (77 percent) rented apartments. Since those outside purchasers who moved freed 4,747 rental apartments, the actual "shortfall" or impact was only 2,712 apartment units associated with the total conversion of 16,145 condominiums (and that assumes that conversions were themselves subsequently rerented.) Thus, the impact of conversions on available rental apartments in 1979 was less than 17 percent of the total conversions.

Stated another way, total condo conversions were 2.82 percent of total rental apartments in Florida in 1979, but their combined impact on vacancies was less than 0.5 percent of the total rental apartment pool over a twelve-month period.

In addition, condominium conversion is a shift in residential status rather than a diminution of available housing. Since the vast majority of condominium conversion purchasers move from within the area of the conversion, the total availability of housing is obviously not decreased.

As previously noted, tenants who moved due to condominium conversions were able to locate alternate residences within a median search time of one month. Extensions beyond six months appear to be of reduced practical significance in relieving or overcoming difficulties associated with choosing an alternative residence. Of greater significance would be an extension of the short time typically made available for tenants to decide whether or not to purchase the condominium conversion itself.

Responses indicated that the hostility and negative feelings of many tenants were due in no small part to the pressure placed upon them in terms of a purchase decision.

A decision of the magnitude associated with a condominium purchase requires sufficient time to consider all factors associated with the tenants' needs, financial resouces, and alternatives. Nonpurchasers should consider both alternative rentals and alternative purchases. They have ample time to find and compare other suitable rental apartments in their area, and should also consider and investigate alternate purchase opportunities, even if initially inclined to buy their own apartments. It is suggested that whatever time period is necessary to find and choose among alternate rental units, a reasonable period might also be as well utilized in the location and comparison of alternative condominium purchases.

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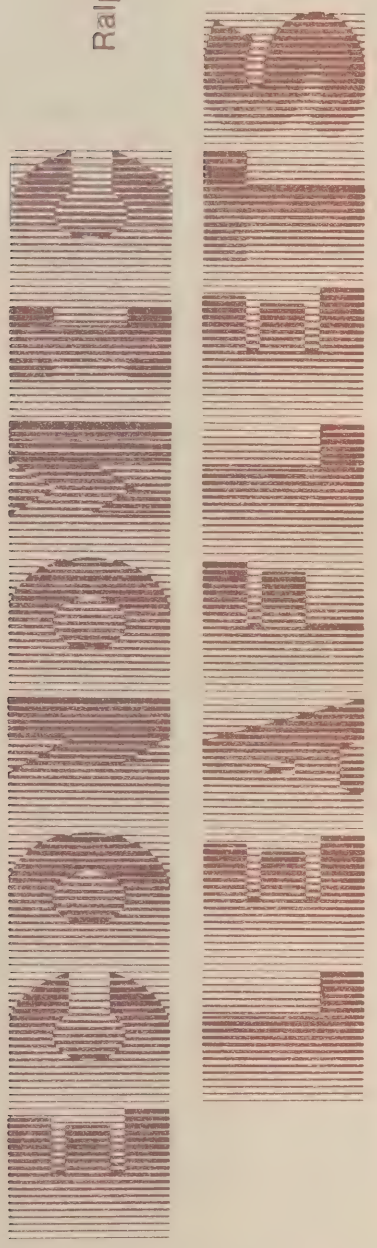

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Counseling the troubled employee

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Drug abuse, alcoholism, emotional illness and family crisis are personal problems of many employees which spill over into the environment of an organization and ultimately affect the individual's job performance while becoming a complex problem for the administration.

A personal crisis involving marital, family, financial or legal troubles is considered the most prevalent problem among all employee groups. It is estimated to affect an average of 10.9 percent of production workers, 7.2 percent of office clerical employees, 6.1 percent of technical professional staff and 5.8 percent of managerial personnel according to a study conducted by the Bureau of National Affairs in March, 1978.

The study also found alcoholism to be the next most prevalent problem, affecting 4.6 percent of both professional and managerial employees, compared to 3.8 percent of clerical employees and 7.7 percent of the production/service group. The incidence of emotional illness requiring psychiatric treatment was higher in 1978 than in 1973 according to 26 percent of the respondents. An increase in marijuana abuse over the past five years was reported by 25 percent.

Once any problem begins to manifest itself on the job (in the form of poor performance) the manager should deal with it directly. He should confront the employee and indicate awareness and concern while specifying the degree to which the employee's job is being affected. The supervisor should not attempt rehabilitative counseling but should have the employee focus upon a change in behavior. Many managers do try counseling and often find that it not only interferes with the manager-subordinate relationship, but prolongs the problem and makes it more difficult to handle when a referral is finally made.

In an article on "The Troubled Employee: Whose Responsibility?" in *The Personnel Administrator* for June, 1979, Christine A. Filipowicz listed fourteen steps in approaching a troubled employee who may need help via early diagnosis and intervention.

1) Establish levels of expected work performance.
2) Be specific about supportive behavioral criteria, i.e., absenteeism, poor job performance and others.
3) Be consistent.
4) Try not to diagnose the problem.
5) Restrict criticism to job performance.
6) Be firm.
7) Be prepared to cope with the employee's resistance, defensiveness or hostility.
8) Try to get the employee to acknowledge the problem.
9) Show that employees cannot play against higher management.
10) Point out the availability of counseling services.
11) Discuss a specific problem such as alcoholism or drug abuse only if it occurs on the job or the employee is obviously affected.
12) Get a commitment from the employee to meet specific work criteria and monitor this with a plan for improvement based on work performance.
13) Explain that the employee must decide for himself whether or not to seek assistance.
14) Emphasize confidentiality of the program.

What may be most important is that the manager be aware of some resources and encourage the employee to make an appointment for appropriate help, following up later to insure that the needed help is being obtained. Organizations should make available for the manager lists of referrals and alternatives for dealing with a problem employee. However, if the employee does not want this help then it should be made clear that continued employment will be dependent upon effective performance and the elimination of the problem.

The model: human resource counseling

One of the most effective methods for working with employees experiencing difficulty on the job is to develop a human resource counseling program focusing on the development of individuals' career paths. If an organization employs a specialist in personnel and/or psychology to deal strictly with the troubled employee, then the impact and effectiveness of this objective will not be realized. This type of pathological effort is quite similar to a "witch hunt." If performance is the focal point of career development, then any problem or regression serves as the focal point for serious analysis as to why individuals are stalled in their professional careers.

The goal of this program is to help managers maximize employees' career potentials through fully exploiting their assets and overcoming deficits. The philosophy of the human resource counseling program is a positive one wherein past and present performance and achievements play a dominant role. The program assumes that the manager's self-interest, incorporated with third-party objectivity of his own supervisor along with the human resource counselor, will result in a maximum contribution for the organization and the individual. The ten steps of the program follow:

1. The professional (counselor) completes a history and profile on the troubled employee (counselee) during the initial interview after referral.
2. Counselor scans individuals who work with counselee and also personally observes counselee on the job.
3. A managerial profile is negotiated. All differences of opinion between both parties must be discussed and resolved.
4. A formal meeting is arranged to discuss the career assessment and planning program where strengths and weaknesses are explored with some plans for change.
5. Counselee must make a personal decision about which options and directions to pursue while counselor contributes advisory comments only.
6. Counselee must summarize the summary of the report of the counselor. This feedback session is intended to clarify the

Figure 1.--Management Diagnosis Profile

Directions: The purpose of this exercise is to begin to get you to do more in-depth thinking about your own abilities, interests and aspirations in preparation for meetings that you will be having with the Human Resource (Personnel) Department.

1. Describe the critical 3 or 4 "make or break" elements in your present job?

	How are you doing here?
a) _____	a) _____
b) _____	b) _____
c) _____	c) _____
d) _____	d) _____

2. Within the next two years, what do you see yourself promotable to?

_____

What do you see as your long-range career potential?

_____

3. a) What is your major strength in relationship to those you supervise?

_____

Major weakness?

_____

b) What is your major strength in relationship to your peers?

_____

Major weakness?

_____

4. What is your major strength in relationship to your immediate superior?

_____

Major weakness?

_____

Figure 2.--Managerial Insight Analysis

What do you feel will be your major contribution in the position you currently occupy?

_____

What do you feel you could contribute most in the position you aspire to?

_____

What do you regard as your most important assets?

_____

What do you regard as your limitations?

_____

What three things in your life provide you the greatest personal satisfaction?

_____

What qualities do you admire most in subordinates?

_____

What qualities do you admire most in associates?

_____

What qualities do you admire most in superiors?

_____

What adjectives do your friends use to describe you?

_____

For what are you most often complimented?

_____

For what are you most often criticized?

_____

Please briefly state:

Three things you want most in life:
Three things you want most in your job:

Figure 3.--Performance-Behavioral Profile

Manager's name_____ Date____ Evaluator_____

Position_____ Company_____

Personal characteristics & disposition

Put "M" by five most accurate.
Put "L" by five least accurate.

		Reasons:
1. Self-confident	____	
2. Self-reliant	____	
3. Persistent	____	
4. Forceful	____	
5. Enthusiastic	____	
6. Optimistic	____	
7. Adaptable	____	
8. Calm	____	
9. Cautious	____	
10. Cheerful	____	
11. Conforming	____	
12. Dependable	____	
13. Energetic	____	
14. Easily aroused emotionally	____	
15. Feels emotions without showing them	____	
16. Hardboiled	____	
17. Impatient	____	
18. Impulsive	____	
19. Individualistic	____	
20. Inhibited	____	
21. Inclined to be cynical	____	
22. Imaginative	____	
23. Limited interest	____	
24. Mature	____	
25. Often feels lonely	____	
26. Over-sensitive	____	
27. Quick-tempered	____	

Problem-solving ability

		Reasons:
1. Exceptionally high level of intelligence	____	
2. States ideas clearly	____	
3. Solves problems quickly	____	
4. Develops solutions showing good judgment	____	
5. Persuasive ability	____	
6. Creativity	____	
7. Analytical ability	____	
8. Decisive	____	
9. Quick	____	
10. Resourceful	____	

Work capacities & attitudes

Put "M" by four most accurate.
Put "L" by four least accurate.

		Reasons:
1. Amount of time he/she is willing to spend on the job	____	
2. Amount of money he/she wants	____	
3. Ability to organize his/her work	____	
4. Self-starter	____	
5. Avoids responsibility	____	
6. Ambitious	____	
7. Conscientous	____	
8. Competitive spirit	____	
9. Diplomatic	____	
10. Enjoys hard work	____	
11. Finds it difficult to concentrate	____	
12. Feel criticism too much	____	
13. Good self-expression	____	
14. Has initiative	____	
15. Indecisive	____	
16. Likes responsibility	____	
17. Lacks initiative	____	
18. Methodical	____	
19. Original	____	
20. Often procrastinates	____	
21. Poor in leadership	____	
22. Preoccupied	____	
23. Reliable	____	
24. Resistant	____	

Relations with people

		Reasons:
1. Ease in establishing contact	____	
2. Pleasant	____	
3. Takes the lead in conversation	____	
4. Service-minded	____	
5. Cooperative	____	
6. Easily annoyed	____	
7. Excitable	____	
8. Easygoing	____	
9. Good listener	____	
10. Good sense of humor	____	
11. Good natured	____	
12. Generally liked by others	____	
13. Good team worker	____	
14. Loyal	____	
15. Likes to lead and supervise others	____	
16. Reserved	____	
17. Retiring	____	
18. Socially skilled	____	

strengths and weaknesses for counselee.

7. Further sessions are to be arranged between both parties since plans should be developed at this session to correct any problems highlighted in the report.
8. A confrontation counseling session is held to deal with serious personal problems such as alcohol or drug addiction which may or may not have been illuminated in the report.
9. An open discussion session is held with counselor, counselee and supervisor. An action plan is formed to correct problems and support the career assessment and planning program.
10. The following evaluations are completed:
    - •Management Diagnosis Profile (Figure 1);
    - •Managerial Insight Analysis (Figure 2);
    - •Performance-Behavioral Profile (Figure 3);
    - •Supervisory Appraisal (Figure 4).

The human resource counselor asks counselees to complete the Management Diagnosis Profile to ascertain how they perceive their own interests, abilities and goals. This is usually completed prior to the session between the two parties. In addition, counselees are asked to complete the Managerial Insight Analysis, a human resource accounting of psychological and social factors important to a counselee within the work environment. Both evaluations serve as an individual's own blueprint which will be altered somewhat after the supervisor submits personal insights about the individual, his performance and any problems.

The supervisor of the troubled employee completes the Performance-Behavioral Profile and describes the counselee's personal characteristics, problem-solving ability, work capacity, attitudes and personal relationships. At this juncture, both strengths and problems are highlighted and can be

contrasted with the Management Diagnosis Profile and the Managerial Insight Analysis previously completed. In addition, a Supervisory Appraisal is completed to yield a complete picture of an individual as perceived by the supervisor.

Now that both sides of the situation are on record, an open discussion and confrontation can take place among the human resource counselor, the supervisor of the counselee and the troubled employee (counselee) to develop an action plan intended to support carreer development and correct any problems which may be thwarting that plan. *At no time is the accusation of a specific problem brought up, but only the performance criteria and progress.*

Quite often, counselees openly discuss their problem as being the roadblock and detour to more effective performance. Since declining performance cannot be rationalized by the counselee as fantasy, a reason must be given to explain problems and career arrest. This reason will eventually emerge in this supportive, yet objective-structured climate.

If employees abort this program at any advanced stage and performance problems continue to surface, then they are usually informed that dismissal may be the next step. If the individual blatantly refuses to accept this process, dismissal procedures are initiated. The responsibility for change always rests with the individual, and performance is the only objective method of evaluating individual effectiveness.

It is not uncommon for some behavioral regression to occur, but this does not indicate that the individual's rehabilitation is unsuccessful. It is only after the individual admits the major cause of performance and personal problems that any success can be achieved via rehabilitation. The organization must show personal involvement by legitimizing a human resource counseling program through a formal policy statement and a concerned management.

Figure 4.--Supervisory Appraisal

I am his/her self____, sup.____, sub.____, peer____, functional____.

_____
Manager's name

		Strength	Weakness	CA*	N/A	Comment
a)	Technical skills					
	Technical knowledge					
	Ability to apply technical information					
b)	Decision-making skills					
	Problem solving					
	Creativity					
	Understanding complex technical problems					
c)	Receiving information skills					
	Interpersonal sensitivity					
	Company environment sensitivity					
	Listening					
	Reading					
d)	Expressive skills					
	General:					
	Writing					
	Formal speaking					
	Persuading others					
	Group:					
	Leading meetings					
	Participation in meetings					
	Individual:					
	Order giving					
	Handling disciplinary problems					
e)	Process of management skills					
	Planning					
	Control					
	Delegating					
	Budgeting					
f)	Management development skills					
	Counseling					
	Coaching					
	Appraisal					

CA*: cannot answer

g) Select five skills from the preceding profile in which you consider him/her outstanding.

h) Next, select the five which he/she needs most to improve.

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Florida voters follow national trend

Julie Wen-Fu P. Shih

Survey Program Director
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Introduction

A tide of time-for-change conservatism has swept President Jimmy Carter out of the White House with a landslide victory for Ronald Reagan. Reagan led Carter by 51 to 41 percent of the popular vote and 483 to 49 in electoral votes. In addition, the Republicans picked up 12 seats in the Senate and gained control there for the first time since 1953.

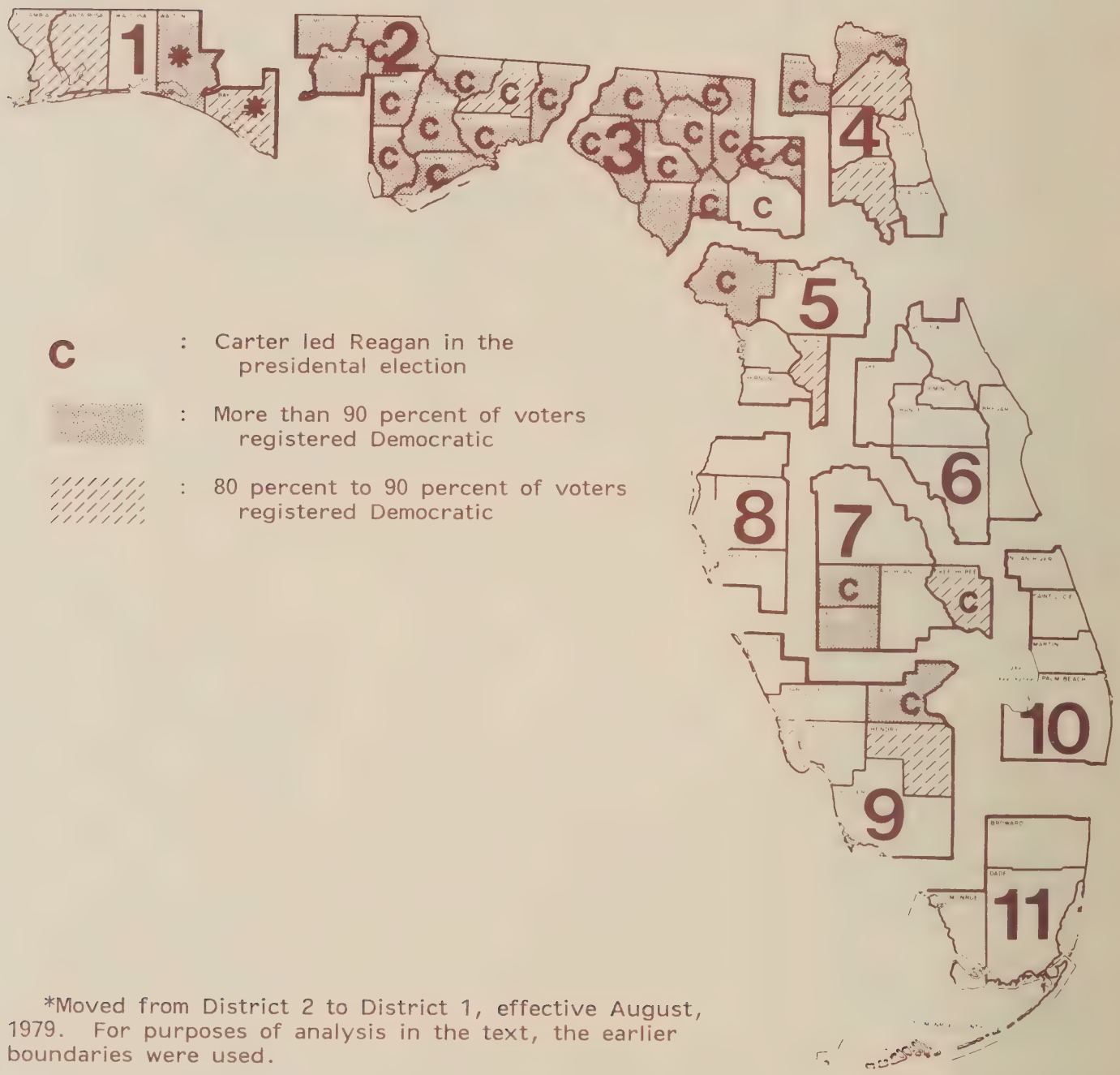
Traditionally Democratic states joined the national trend and gave Reagan and Republican candidates victory--Florida was no exception. Based upon the first election results (not including absentee ballots), Floridians voted 55 percent for Reagan, 39 percent for Carter, 5 percent for Anderson and 1 percent for Clark. Moreover, Floridians selected Republican Paula Hawkins to become the second woman in the U.S. Senate by defeating Democrat Bill Gunter.

Over this century, the Democratic Party has had overwhelming control of political power in Florida. Before 1965, no less than 80 percent of Florida's registered voters were Democrats. In the past three decades, however, Florida experienced dramatic population growth. Northern Republicans immigrating to the state gradually strengthened the GOP. Today, with 28 percent of registered voters, the GOP is still a minority position, but there is a growing trend of "Republicanism," especially in southern counties.

The distribution of party affiliation in the state has followed geographic lines; the north and central areas are traditionally Democratic with most counties having 90 percent or more registered as Democrats, with the greatest concentration of Republicans in southern counties and on the west coast from Pinellas to Collier Counties.

In the 1976 Presidential election, Carter defeated President Ford by winning 52 percent of the popular vote. The panhandle and the southwest coast (Sarasota to Collier counties) were the only areas that did not support Carter. Out of 67 counties in the state, Carter received a majority in 51 counties.

Figure 1.--1980 Presidential election results and counties with more than 80 percent of voters registered Democratic



*Moved from District 2 to District 1, effective August, 1979. For purposes of analysis in the text, the earlier boundaries were used.

Election analysis

Figure 1 shows counties with more than 80 percent of voters registered Democratic and the counties in which Carter led Reagan. Carter won majority support in traditionally Democratic north and central Florida. Out of the 24 counties that supported Carter, 20 counties had 90 percent or more voters registered as Democrats. The rest of the state--the east coast, the west coast, the southern counties and the panhandle--overwhelmingly supported Reagan. Those counties have large populations, high proportions of northern retirees and strong economic activity.

With more than 65 percent of the voters registered Democratic in Florida, Carter won only 39 percent of the popular vote. Elsewhere than in north and central Florida, party affiliation did not play a strong role in this

Table 1.--Demographic characteristics and general election results in planning districts

District	Total population April 1, 1979	Percentage of population: Age 65 and older	Percentage of population: Registered Democratic	Percentage of population: Blacks registered Democratic	1978 per capita income	Percentage of 1980 general election vote for: Carter	Reagan	Anderson
1	395,579	6.71	83.45	8.92	5,917	33.19	63.34	2.66
2	413,531	12.87	95.44	18.12	4,994	51.79	44.55	2.59
3	275,263	11.96	92.40	16.20	5,106	54.30	42.26	2.87
4	723,144	11.63	68.32	14.37	5,768	46.02	51.24	2.08
5	227,075	20.43	79.84	10.99	5,788	41.65	47.67	9.97
6	1,252,677	17.12	62.39	11.06	6,859	35.05	60.29	3.63
7	401,132	15.18	84.01	10.39	6,405	38.17	58.47	2.54
8	1,662,987	27.04	62.27	7.83	6,367	36.54	51.39	11.31
9	590,950	21.59	60.14	8.00	7,534	35.01	60.46	3.65
10	761,027	16.68	58.28	12.99	8,141	30.72	57.09	11.43
11	2,541,839	16.70	75.87	11.68	8,519	37.91	52.82	8.33
Florida	9,245,231	15.61	65.81	9.04	7,578	38.89	55.21	5.01

Presidential election. The question, then, is what characteristics of the counties influenced the election. The election results and general characteristics of the population are summarized by planning district in Table 1.

Carter led Reagan in Districts 2 and 3 which are located in north and central Florida. Both districts had more than 92 percent of voters registered Democratic, high concentrations of black voters, and the lowest per capita income in the state. Reagan defeated Carter with the largest margins in District 6 (the Orlando area) and in District 9 (the Sarasota area) with more than 60 percent voting for Reagan. Only 62 percent of voters in these two districts were registered as Democrats and the proportion of population age 65 and older is relatively high in these areas.

The voting outcome for Anderson was divergent across the state. More than 11 percent of voters in District 8 (the Tampa-St. Petersburg area) and District 10 (the West Palm beach-Boca Raton area) supported Anderson, while Districts 1, 2, 3, 4, and 7 voted less than 3 percent for Anderson. It is surprising that with more than 27 percent of the population age 65 and older, Anderson gained so much support in the Tampa-St. Petersburg area.

Statistical correlations

To further investigate election results in the state, a correlation coefficient technique was used to study associations between county characteristics and the outcome of the general election.

Correlation coefficient r is a coefficient which measures the linear relationship between two variables. The value of r lies between -1 and +1. The strength of the relationship is given by the magnitude of r, where the sign of r tells one whether the value of one variable tends to increase or decrease with the other variable, with the positive value indicating that one tends to increase with the other.

Table 2 illustrates the correlation coefficients between election results and some characteristics of counties. The variables are as follows:

Carter:	proportion of voters in a county voting for Carter
Reagan:	proportion of voters in a county voting for Reagan
Anderson:	proportion of voters in a county voting for Anderson
Income:	per capita income in a county
Democratic:	ratio of registered Democrats to total voters in a county
D-black:	black registered Democrats in a county
R-black:	black registered Republicans in a county
Old:	ratio of people aged 65 and older to total population in a county
Population:	total population in a county

Variables Income, Old, Democratic, D-black and R-black are significantly related to the Carter, Reagan and Anderson votes. In general, lower income counties supported Carter and richer counties supported Reagan. Anderson was also moderately supported in higher income counties. Counties with lower ratios of people age 65 and older tended to vote for Carter, while areas with higher ratios of senior citizens tended to support Reagan and Anderson. As previously stated, Carter defeated Reagan and Anderson in predominantly Democratic counties. The total population in a county moderately influenced the votes for Carter, but not for Reagan and Anderson. Carter led Reagan in less populated counties. Black voters showed strong support for Carter whether Democrats or Republicans. Neither Reagan nor Anderson gained strong support in large black-voter areas.

Table 2.--Correlation coefficients between demographic characteristics of counties and general election results

	Carter	Reagan	Anderson
Income	-0.57**	0.50**	0.22**
Old	-0.40**	0.28**	0.28**
Population	-0.20*	0.15	0.11
Democratic	0.70**	-0.62**	-0.24**
D-black	0.47**	-0.47**	-0.07
D-black	0.55**	-0.48**	-0.22**

Note: *Statistical significance at $\alpha = 0.05$.
**Statistical significance at $\alpha = 0.01$.

The primary results have not been widely discussed by political researchers as possible factors in analyzing the outcome of general elections. Table 3 displays the correlation coefficients between the results of the March primary and November general election in Florida. The variables are

P-Carter:	ratio of Carter voters to total voters in primary
P-Kennedy:	ratio of Kennedy voters to total voters in primary
P-Reagan:	ratio of Reagan voters to total voters in primary
P-Bush:	ratio of Bush voters to total voters in primary

As expected, both Carter and Reagan had strong support in the general election in the same counties as in the primary. The correlation coefficients were as high as .78, which means that the outcome of the general election for Carter or Reagan can be predicted about 61 percent ($.78^2$) from the results of the corresponding primary. The negative relation between the Carter primary and the Anderson turnout in November was as expected. Carter supporters in March did not turn out to support Anderson in November. Kennedy's primary results did not show significant effect on either Carter's or Reagan's results. Kennedy supporters may be evenly divided among the three candidates.

The interesting finding concerned those counties that supported Bush in the primary. They had lower votes for Carter but relatively large support for Anderson and moderate support for Reagan. Bush supporters were more likely young and less conservative, and therefore turned their support to Anderson and the Reagan-Bush ticket in the November election. By selecting Bush as a running mate, Reagan seems to have gained support from moderate Floridians.

Table 3.--Correlation coefficients between primary election results and general election results

Primary	General election		
	Carter	Reagan	Anderson
P-Carter	0.78**	-0.47**	-0.67**
P-Kennedy	0.17	-0.02	-0.20*
P-Reagan	-0.71**	0.77**	0.02
P-Bush	-0.69**	0.32**	0.76**

Note: *Statistical significance at $\alpha = 0.05$.
**Statistical significance at $\alpha = 0.01$.

Conclusions

Party affiliation did not play an important role in the 1980 Presidential election. With more than 65 percent of voters registered as Democrats, only 39 percent voted for Carter. Carter led Reagan in 24 northern and central counties, while Reagan defeated Carter in the rest of the state. In general, lower income, less populated, rural counties supported Carter, and higher income, more populated counties with a large percentage of retirees voted for Reagan. The counties which strongly favored Carter or Reagan in the March primary continued to support them. Bush's supporters in the primary most likely voted for Anderson or the Reagan-Bush team in November.

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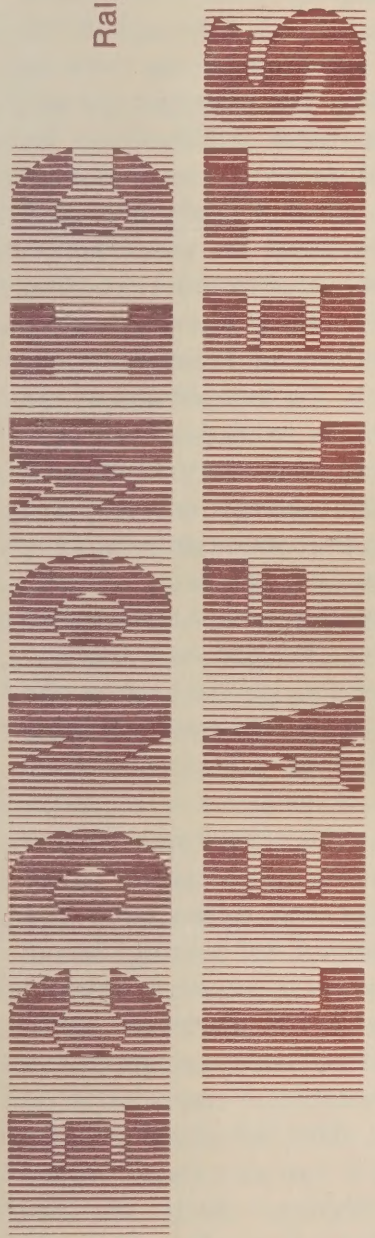

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Florida's higher education: Planning for tomorrow

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D. Burke Kibler III

The following is an edited version of an address to the Graduate School of Business Administration's Homecoming 1980 Alumni Breakfast on Saturday, October 25, 1980, by University of Florida alumnus D. Burke Kibler III.

Mr. Kibler, a partner in the Lakeland law firm of Holland & Knight, is a member of the Florida Council of 100. A member of the Board of Regents from 1967 to 1975, he served as chairman in 1969, 1970 and 1971. He has also served on the Select Council on Post High School Education [1970], on the Florida Postsecondary Education Commission as chairman from 1977 to 1980, and the Postsecondary Education Planning Commission [1980]. He is a former trustee of the Florida Board of Regents Foundation and a member of the board of directors of the University of South Florida Foundation.

If there is an appropriate theme for any remarks given to a homecoming crowd, it is what the future holds for this university. I have had reasonable exposure to higher education over the last decade and a half. This does not necessarily qualify me to have better insight into what the future holds for this and other universities but I have been interested, I have been involved, and I am happy to share some of my thoughts.

I have recently been appointed to the Postsecondary Education Planning Commission which has as its primary mission the preparation of a master plan for all postsecondary education. Such a plan will of course affect this and other institutions of higher education within our state. I will try to concentrate my remarks on just how this commission and its activities might affect the University of Florida. These are my personal views and should not be considered views of other members of the Postsecondary Education Planning Commission or of the commission itself.

First let me take you back a bit into the history of planning for higher education in Florida. It began in Florida in 1905 with the Buckman Act

which established one of the first lay-governed multicampus university systems in the nation by consolidating the existing institutions to which the state was giving some support into the University of Florida, the Florida State College for Women, and the Florida Agricultural and Mechanical College. Some twenty years later, in 1927, there was an Educational Survey Commission which recommended improvements in the public education system of Florida. Eighteen more years elapsed, and in 1945 the Florida Citizens Committee on Education changed Florida State College for Women into Florida State University and made both FSU and the University of Florida coeducational. It also called for the development of a twenty-five year plan for education in Florida. In 1953 a council for the study of higher education in Florida resulted in the Brumbaugh Report, which is a framework for the current community college system. In 1970 the Select Council on Post High School Education presented to the legislature a comprehensive plan for higher education in Florida, and in 1971 a Citizens Commission on Education, which primarily focused on elementary and secondary education, called for the establishment of a lay board to set policy for all public education in Florida. In 1978 there was a Commission on the Future of Florida's Public Universities which sought greater quality in the public institutions of higher learning, and in 1979 the legislature created a joint legislative and executive commission on postsecondary education which made some thirty-five recommendations concerning higher education in Florida, the primary recommendation being that Florida have a master plan for higher education.

The point of this recitation of history is that the intent to plan for higher education in Florida is not new. We try and try, but it remains difficult to accomplish. However, we have a governor committed to having a master plan for higher education in this state, and a legislature that wants a master plan for education and some changes in our higher-educational structure. All of this leads to the conclusion that some significant changes will occur within the next decade, and inevitably these changes will affect the University of Florida.

As we move into the 1980s we are all aware of certain things. We are no longer faced with a period of rapid expansion in higher education. No forecast that I know of projects more than a slight increase in student enrollment over the next several decades. Another major change will be in the area of economics. Greater fiscal constraints will be imposed upon universities and other public institutions, and the allocation of available resources will be a matter of great priority and concern to all. I think you will see renewed efforts to emphasize the urban university at the expense of the nonurban university. The energy crisis will of course be one of the major justifications for those who would like to see a concentration of state resources in urban areas. Clearly there will be the continuation of ceilings on enrollments, and many attempts and recommendations that involve consolidation. We have already seen a number of plans to consolidate and combine areas of the state universities in the last session of the legislature. Some of these consolidations will doubtless come into being in the future. We will see continued attempts to change not only the system of governance at the universities but the entire educational structure of the state as well. Clearly, many of the areas that have been marked for change will in fact be changed and, clearly, many ought to be. All of this points back to the considerable need for a recognized cohesive general master plan for all higher education within our state.

But if we are not successful in the production of such a master plan, we are almost assured that many unplanned changes will take place. The higher education bill passed in the legislature during the last session, and subsequently vetoed, was not a bad bill. It in fact incorporated about twenty-five of the thirty-five recommendations of the joint legislative and executive commission on postsecondary education. This bill would perhaps not have been vetoed if it had not encompassed too many ancillary things, such as the Jacksonville hospital situation. It also had considerable opposition from the Chancellor and certain members of the Board of Regents. I frankly could never quite understand that because the bill did not in my opinion weaken the present governance system but rather allowed for its strengthening. It seems to me inevitable that we ultimately will have some sort of joint

coordinating board within the state to have the responsibility to plan and coordinate all higher education—community colleges, vocational and technical schools, and the state universities—that should include in its planning spectrum the independent sector to assure appropriate coordination between the public and independent sectors of higher education.

Such a board, properly constituted and administered, in no way poses a threat to university governance, for under such a system there would still be a governing board for the state universities. The consolidated governing board concept has served the state well, but I think we can greatly improve upon the administration of our universities by having institutional boards of trustees. These boards would not replace the Board of Regents but would operate under it. In fact, the Board of Regents currently delegates to the president of each institution most of the operational responsibilities of that institution. I would not see this changing except that the individual institutional boards would have delegated responsibilities including authority to select presidents and would operate as lay boards customarily and traditionally operate in relation to an instituiton. If you believe in the concept of a lay governing board, then it is difficult for me to understand why there should be resistance to such a plan. There is not any meaningful way that the Board of Regents can act as governing board in truth and fact for nine diverse universities. I think something is lost under the present system that should not be.

Another thing that I think should and probably will happen is the state's contracting with the private sector to fill future needs by taking existing strengths within that private sector and contracting on a permanent basis for state support. We have made a major step in this direction by the tuition assistance plan adopted two years ago by the legislature which allows an individual student to in effect contract with the private university of his choice and be subsidized to a degree by the state. Of course, there should be a careful examination made of the opportunities and pitfalls that exist in this area. A proposal was recently presented to the Postsecondary Education Planning Commission to examine and recommend various contract applications of private institutions with the state system. This was premature in my judgment, and the commission determined that it should take no action at this time but suggested that the concept of contracting be incorporated into the master plan as a planning tool. Clearly, contracting with private institutions will happen and should happen. The idea of consortia in education is one that will receive more visibility and utilization in the future. We must combine to conserve resources and be less competitive in the ways we have been competitive in the past. There is too much to be done and too little with which to do it to waste any resource. The duplication and proliferation that has been too evident in the past must be diminished in the future.

All of this is going to change this university, but I wonder to what extent universities ever really change. Universities tend to be in a constant state of change, and that which is changing on almost a daily basis somehow withstands attempts to radically change it. The only contrary instance that I can think of is the violence of the 1960s. The universities were not prepared for that and some did undergo profound change. Fortunately the University of Florida withstood that period well, largely due, I think, to the leadership of Stephen O'Connell. But most universities, even those that did not weather those turbulent times as well as this, have survived and perhaps now regained their former stature.

A university is indeed in many ways a contradiction—the inherent contrast between the educational function of transmitting existing information and skills and existing values on the one hand, and the distinctive university process of investigation, of evaluation and of criticism that may question whatever is existing on the other—which adds up to an enigma. But you cannot have original creative minds at work in a university without generating questions and constantly asking why things are done as they are and why they cannot be improved. The questioning goes on and on as, simultaneously, the institution instructs students and trains them and encourages them to be good citizens, and, we hope, fosters an appreciation of their heritage and an incentive to perpetuate that heritage.

I have often pondered over what is the best

definition of a university and I leave you today with the best I know. In the words of Henry Steele Commager: "A university is a community of scholars, old and young, and its function is to provide scholars with the environment and the facilities conducive to the discovery and transmission of ideas and to their application to the larger community present and future." I think this fairly describes this university that is ours. I know we will all work to keep it that way.

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